

Aline CRM: A lead management tip sheet

Aline CRM is an advanced CRM solution designed to help enhance efficiency by streamlining the conversion process, saving time and money. It can also help shorten sales cycles, while improving decision-making through actionable insights with real-time analytics for a seamless lead management process.



How it works:

STEP 1 Prospective resident or family member inquires about your community through a lead source. Electronic leads pre-populate into the CRM and sales is notified.

STEP 2 Auto-responder is sent. Contact center calls prospect in as little as two minutes.

STEP 3 Prospect and family members schedule tour.

STEP 4 Automated email or IM is sent confirming the tour.

STEP 5 Automated post-tour survey and thank-you message is sent after the tour.

STEP 6 Resident moves into community and record is updated in the CRM.

STEP 7 Thank-you message and real-time crisis notifications are automatically sent as needed.

STEP 8 Residents and family members continue to receive community updates and information.

Our CRM solution can help you experience up to:

4%

INCREASE - occupancy within first 6 months

35%

INCREASE - inquiries captured

12%

INCREASE - move-in conversions

Benefits and features include:

SEAMLESS INTEGRATION Facilitate the consolidation of data, ensuring all information is centrally accessible and manageable.

LEAD CAPTURE AND PROFILE Tailor communications and offerings specific to each prospect's needs and preferences.

CONFIGURABLE WORKFLOWS Customize workflows to a community's specific needs to help guide the sales team through the sales process.

TRACK LEADS AND PERFORMANCE Track sales conversion and life cycle by location, care level, market source, and sales team member.

REAL-TIME NOTIFICATIONS AND REMINDERS Schedule tours, meetings, and follow-up calls efficiently, making sure all interactions are logged and none are missed.

CUSTOMIZATION AND USER ACCESSIBILITY Generate necessary communications quickly with custom templates.

ANALYTICS AND REPORTING Gain insight into the effectiveness of various sales activities and strategies to understand what works and what needs improvement.

Contact us at **866.469.3766** or visit **matrixcare.com** to request a consultation or to learn more.