

Optimizing conversions in senior care with proven strategies

LIFE PLAN COMMUNITIES / SENIOR LIVING



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Convert more inquiries into move-ins, reduce strain on sales teams, and streamline the prospect journey.

Senior care is evolving. Prospects are more discerning, the decision process takes longer, and the competition is fierce. Marketing teams need tools that generate leads and nurture them with care.

However, traditional tactics are no longer enough. Mass emails and one-size-fits-all campaigns miss the mark. Communities that succeed are the ones that personalize the journey and make every touchpoint count.

The right solution is built to drive efficiency, visibility, and conversions for senior living and life plan communities. That means communities can manage occupancy, admissions, and relationships all in one system.



Conversions matter more than ever

As sales teams face growing inquiries amid an aging population, they also face limited bandwidth. Paired with disconnected processes, senior care is experiencing dropped leads, slow follow-up, and lost move-ins.

Conversions are the heartbeat of growth. They drive occupancy, they fuel financial stability, and they create opportunities to deliver excellent care. But in an era of care where the demand for senior housing is at an all-time high and sales teams are stretched thin, driving occupancy comes with significant challenges:

Dropped leads

Digital engagement that isn't captured means opportunities vanish.

Slow or inconsistent follow-up

Prospects lose interest without timely, personal outreach.

Unclear lead prioritization

Without direction, teams may miss the prospects most likely to convert.

Fragmented data

Disconnected systems prevent clear tracking and personalized engagement.

Referral dependence

Overreliance on third-party leads adds costs and reduces control.

Lost move-ins

Every unanswered inquiry is a missed chance to support a prospect and grow occupancy.



4 steps toward a prospect journey that converts

1

Early prospect engagement

While prospects who self-identify readiness are more likely to move in, they're likely unsure of what type of care or setting is right. They often begin their search online but aren't always ready for a sales call. Capturing these prospect needs early in the journey drives stronger engagement.

With the right solution, you can meet prospects where they are. Interactive tools and smart intake processes help them self-assess while giving your team the insights to personalize outreach. Prospective residents gain clarity and your team focuses energy on the most qualified leads.

2

Smart CRM processing

Once leads are qualified, prioritizing next steps is critical. Without clear insight into needs and readiness, valuable prospects can stall. That's why your solution should bring engagement signals, qualification data, and AI-powered summaries into one system

Communities using the right tool can see a

99%

increase in inquiry-to-move-in conversions within 90 days

3

Automated outreach

Prospective residents rarely commit after the first touch. But without consistent follow-up, even strong prospects lose interest.

Marketing automation keeps communication flowing. Personalized emails, event invites, and helpful resources arrive on time, every time. Smart forms trigger instant follow-up from any source including websites, events, or referral partners. Branded templates ensure every touchpoint feels professional and on-message.

Beyond communication, automation takes repetitive tasks off your plate:

- > Initial leads or referrals are captured instantly and assigned to staff with automated next steps
- > Follow-up tasks, reminders, and emails are automated to ensure no prospect gets missed
- > Communication is logged, interactions are tracked, and visibility is provided after prospects express interest
- > Documentation is synced with the EHR to ensure a smooth transition after the prospect's decision to move forward and admission is approved
- > Dashboards and reports show conversion rates, sales performance, and referral efficiency after move-in

Communities using the right tool can experience:

Up to
40%
increase in tours

99%
more move-ins

45%
fewer referral fees

4

Seamless tour scheduling

When prospects are ready, scheduling should be easy. Phone tag or clunky processes can kill momentum.

With the right solution, tours are scheduled directly in the CRM. Prospects get instant confirmation by text, along with reminders and details. No-shows drop and the process feels seamless from the start.

The system reinforces your brand while your team spends less time on logistics and more time creating a warm, memorable experience during the tour.



Optimizing conversions for your care setting

Engagement needs can vary by care setting, which is why innovative prospect engagement tools can foster natural growth for different types of communities.

Life Plan Communities

Multiple property management

With multi-community customization in one platform, they can streamline marketing efforts and keep branding consistent.

Longer lead times

Automated drip campaigns keep leads engaged over extended periods to maintain interest, and attribution reporting helps optimize spending.

Complex web of prospects

All interactions can be tracked in one place.

Various stages of the lead journey

Pre-built templates and a centralized content library mean personalized campaigns can be created quickly, no matter where your lead is on their journey.

Senior living

Audience with varied preferences

Tailored messaging improves relevance and engagement for a varied audience.

Personal connection

Lead nurturing helps teams maintain contact and stay top of mind where personal connection is a strong motivator.

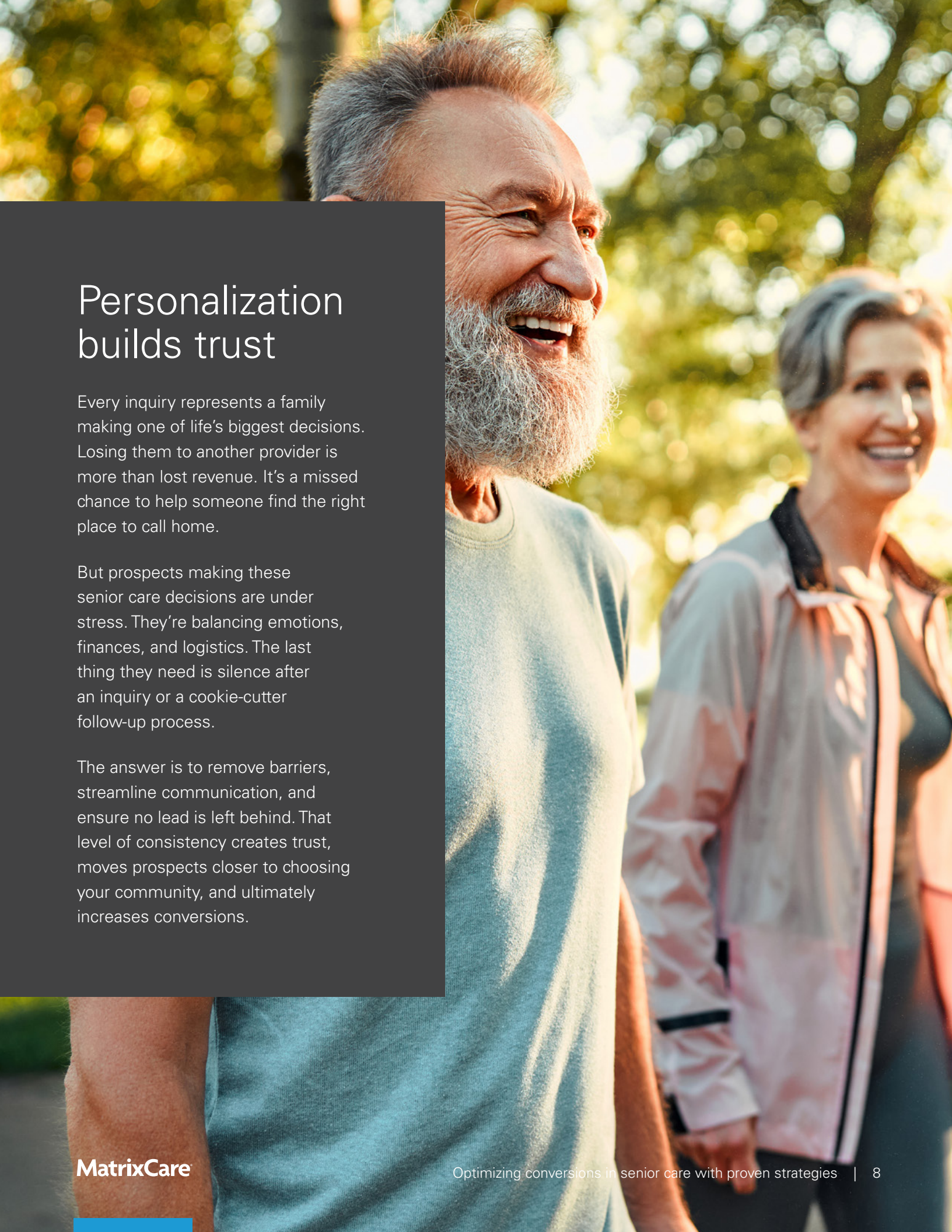
Engaging the prospective resident and their family

Personalized campaigns cater to both audiences seamlessly.

Maximizing ROI

Attribution data can focus efforts on the most effective engagement channels.





Personalization builds trust

Every inquiry represents a family making one of life's biggest decisions. Losing them to another provider is more than lost revenue. It's a missed chance to help someone find the right place to call home.

But prospects making these senior care decisions are under stress. They're balancing emotions, finances, and logistics. The last thing they need is silence after an inquiry or a cookie-cutter follow-up process.

The answer is to remove barriers, streamline communication, and ensure no lead is left behind. That level of consistency creates trust, moves prospects closer to choosing your community, and ultimately increases conversions.

About MatrixCare

MatrixCare provides software solutions in out-of-hospital care settings. As the multiyear winner of the Best in KLAS award for Long-Term Care Software and Home Health and Hospice EMR, MatrixCare is trusted by thousands of facility-based and home-based care organizations to improve provider efficiencies and promote a better quality of life for the people they serve. As an industry leader in interoperability, MatrixCare helps providers connect and collaborate across the care continuum to optimize outcomes and successfully manage risk in out-of-hospital care delivery.

About Aline

Aline is committed to guiding senior living onto an accelerative path that elevates the aging experience for seniors and their families, while driving efficiency and insight for operators and owners so they can outperform expectations. Their advanced CRM solution, Aline CRM, is designed to help reduce resident admission times, streamlining workflows and turning hours into minutes. It can also help reduce the time for referral intake, while improving decision-making through actionable insights with real-time analytics for a seamless referral management process.

About Resmed

As a global leader in health technology, Resmed has developed transformative cloud-connected medical devices and solutions for people with sleep apnea, COPD and other chronic diseases. Today the company is applying this digital health expertise more broadly through its Residential Care Software, offering comprehensive software platforms that support healthcare providers in settings outside of the hospital.