



be.group Implements a New CRM System to Synchronize Sales and Marketing

Lansdale Group Helps Senior Living Operator, be.group, Synchronize Sales and Marketing and Streamline Sales Processes With a New CRM System Based on Salesforce.com

CLIENT'S CHALLENGE

be.group, a senior living operator serving nearly 4,000 residents, had recently defined a roadmap to improve their lead acquisition and nurturing processes and implement a new sales methodology. be.group envisioned a sales system in which sales people would receive new leads as soon as, but not before, they had been qualified in Hubspot, be.group's marketing solution, along with a full history of marketing interactions. From that point forward sales would be aware of all subsequent marketing touches. And, all subsequent marketing touches would be informed by and tailored to complement sales milestones accomplished by the sales team. Once a lead had been

passed to the sales team at a community, the system would also walk the sales team through discovery and planning exercises proven to help achieve sales success. Finally, the system would have to support senior living specific nomenclature, sales processes, and reporting metrics. To support these improvements, be.group recognized that they needed a flexible and customizable CRM platform with tight integration to Hubspot. With its best-of-breed CRM features, flexible platform and seamless bi-directional integration to Hubspot, Salesforce.com was the natural choice for a CRM system upgrade.

"Anyone who has ever gone through the transition from one CRM to another knows that it's not for the faint of heart. Lansdale Group made the process of configuring Salesforce.com and integrating it with our marketing platform to meet our needs immeasurably easier. They have been ridiculously patient, responsive...just a great partner to work with."

Dan Hutson, Vice President
Communications & Marketing

LANSDALE GROUP'S SOLUTION

Choosing the right system is, of course, just the beginning. Lansdale Group was able to leverage accelerators, or pre-built templates, specifically designed to support senior living CRM to help be.group implement Salesforce quickly. The result was a system with best-of-breed CRM features such as Outlook integration, a mobile client, and powerful reporting tools as well as support for senior living specific sales activities such as managing relationships with multiple contacts associated with a prospect, managing external business development activities and relationships, and coordinating the pre-move in process. Key features and benefits of the resulting solution include:

- A highly automated call center including call scripting based on Salesforce Service Cloud Console and Five9's Cloud Based Call Center.
- Bi-directional synchronization of sales and marketing activity between Hubspot and Salesforce to harmonize sales and marketing efforts.
- Direct integration with popular lead referral services including automatic duplicate checking to reduce the data entry burden and ensure that referral commissions are paid only on legitimate new leads.
- A seamless event registration process including integration of event-specific self-service landing pages in Hubspot to a registration list in Salesforce to reduce data entry.
- Built-in worksheets for sales discovery and planning activities to help ensure conformity to be.group's standard sales process.
- Notifications and reminders to ensure that all leads receive follow-up.



LANSDALE GROUP'S SOLUTION *(continued)*

- Dashboards showing key performance metrics such as inquiries to tours, tours to deposits, and sales cycle times to support continuous sales process improvement.
- Support for pre-move-in activities including entry fee and deposit tracking to support financial forecasting.
- Tools for managing external business development activities and sourcing leads to specific referral sources to better measure EBD effort vs. results.
- Duplicate checking on lead entry across all communities to ensure that be.group provides a single thread of personalized sales and marketing integrations with each prospect among all communities in which that prospect has expressed an interest.

- Tools for reassignment of prospects and rescheduling of activities to ensure optimal follow up frequency.

The project also involved data migration from a senior living industry specific CRM system, an iterative requirements\design process, preparation of customized user training materials, and post-go-live support and knowledge transfer. Following a smooth rollout, be.group now has a CRM system that fulfills their current needs but also positions them for continuous improvement.

BUSINESS IMPACT

Since implementing Salesforce, be.group has saved money by consolidating lead nurturing activities, formerly handled by a third-party call center, between Hubspot and the community-based sales teams. In addition, be.group has implemented, and ensured compliance with, a standard sales methodology leading

to higher close ratios. But most importantly, be.group has better visibility into the status of their entire active prospect base, where those prospects came from, and all sales and marketing interactions so that sales and marketing can work together in the most complementary way.