LeadingAge® Illinois

MOMENTUM
2023 ANNUAL MEETING & EXPO
Renaissance Schaumburg
Convention Center - Schaumburg, IL

Using Data to Increase Conversion

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Quick level set on today's reality

What data should we be using?

How should we use it?

What can better results look like?

State of Senior Living

Today's top challenges:

– Occupancy continues putting pressure on marketing budgets

– Staffing is more challenging than ever, amidst the pandemic and the "Great Reshuffle"

– Changes occur daily across business, consumer, economy, environment, competition, technology and more

   • COVID-19 has dramatically accelerated the pace of change

USING DATA TO INCREASE CONVERSION
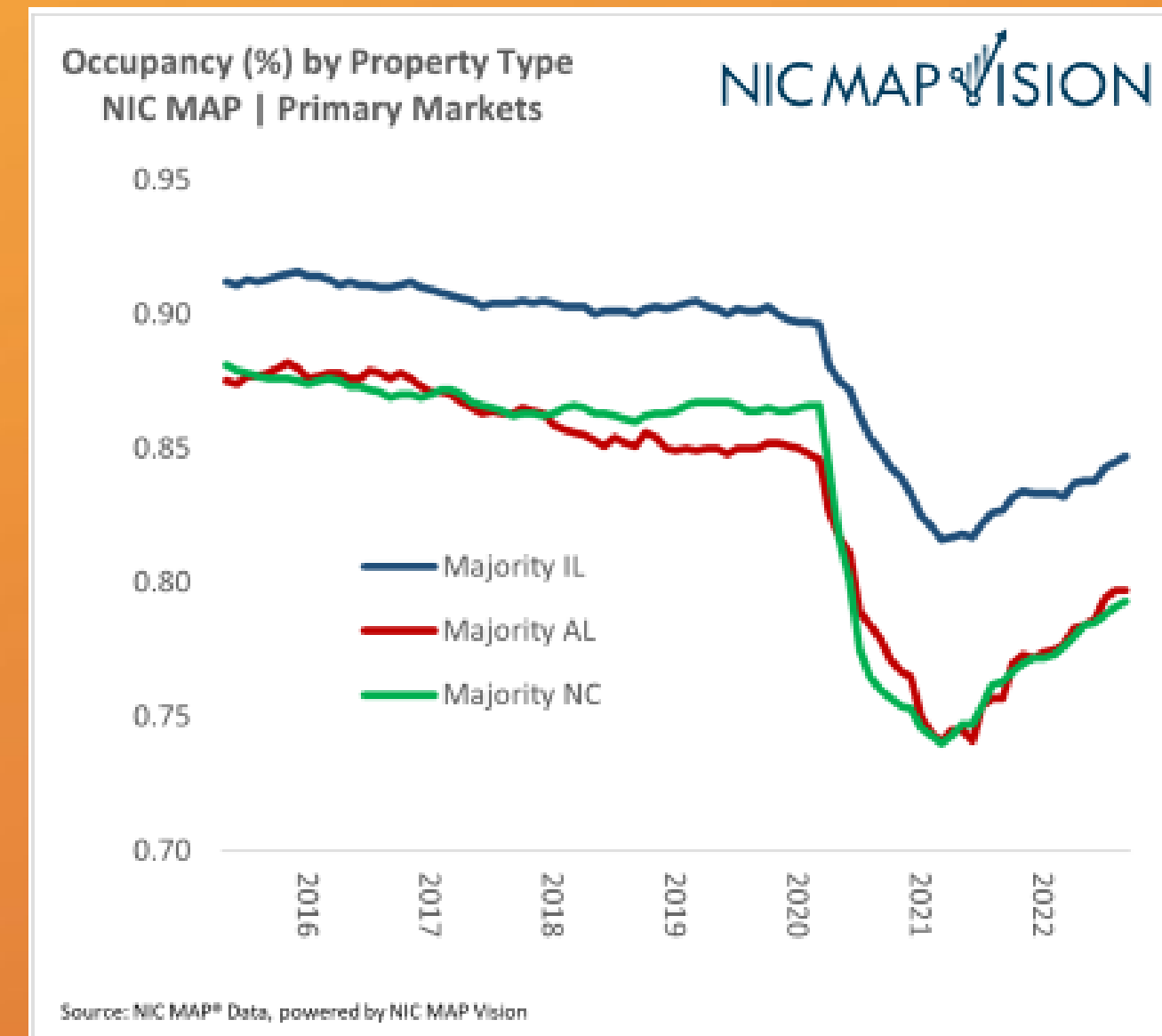
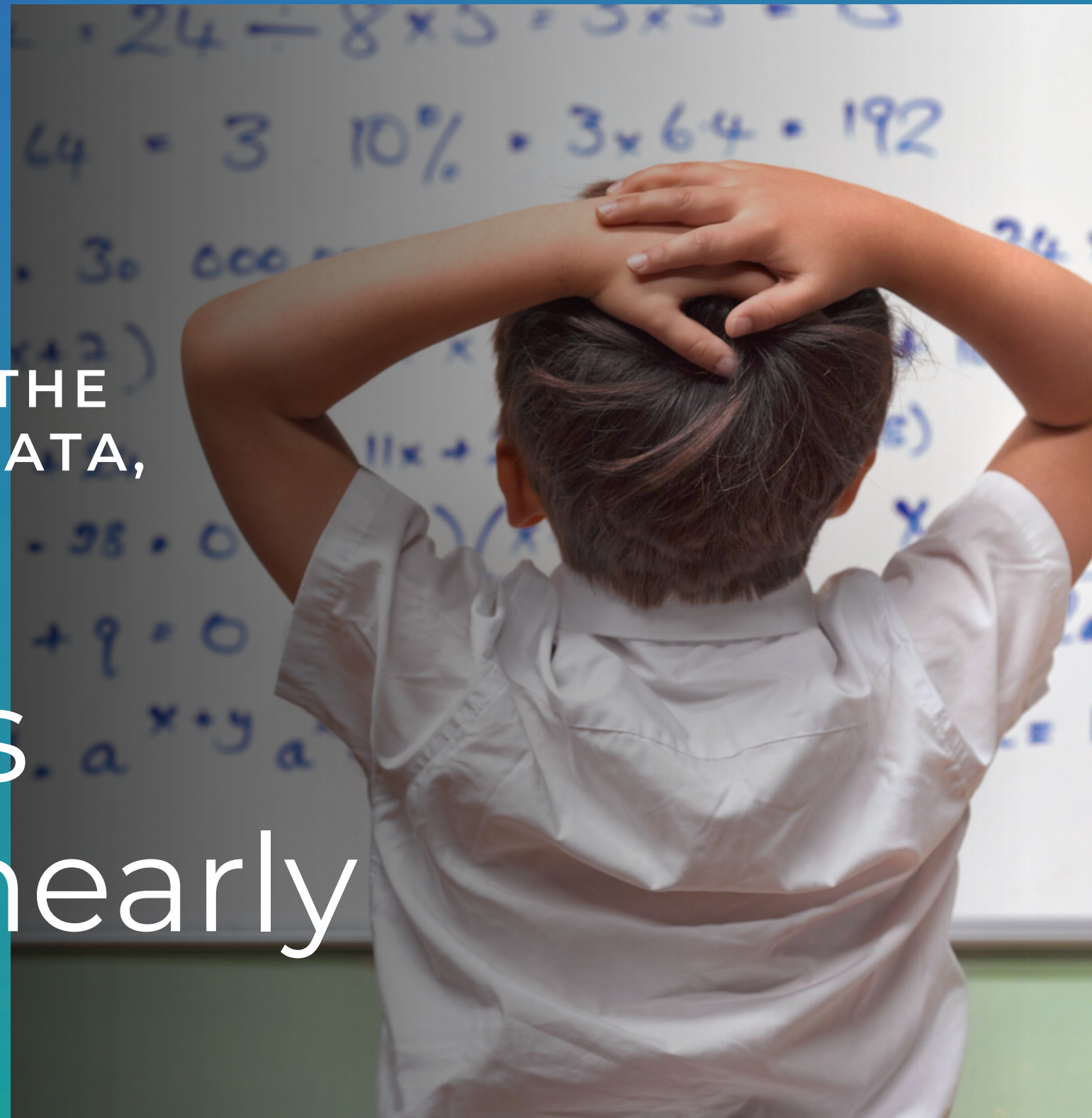# Buyer journeys are more digital than ever

Understanding the journey across each message, each interaction, each channel is a challenge

We continually hear that sales teams have limited visibility to each buyer's journey
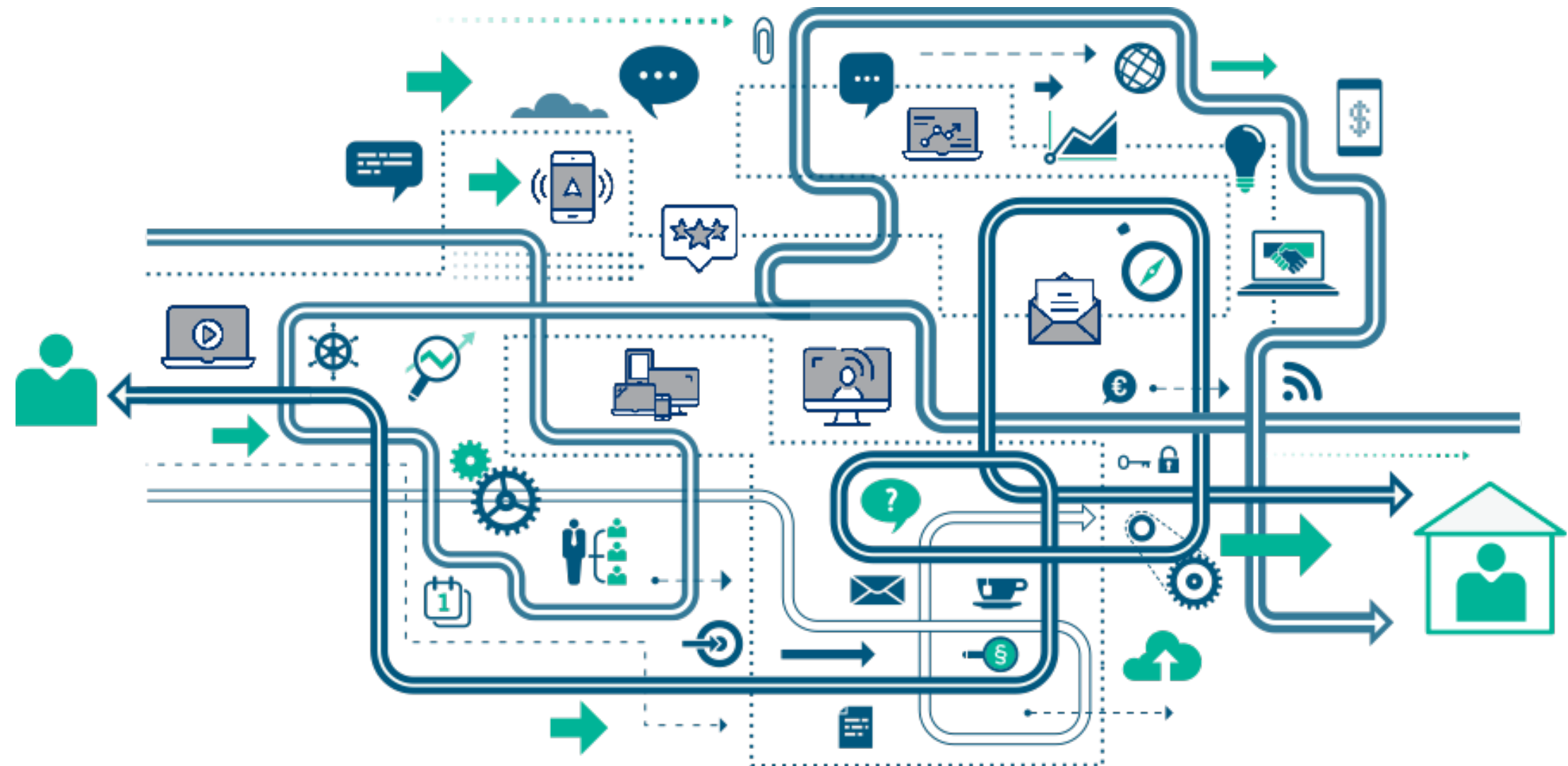
THE REALITY IS … WITHOUT THE APPROPRIATE TOOLS AND DATA,

Generating & working leads effectively is nearly impossible

USING DATA TO INCREASE CONVERSION

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Quick level set on today's reality

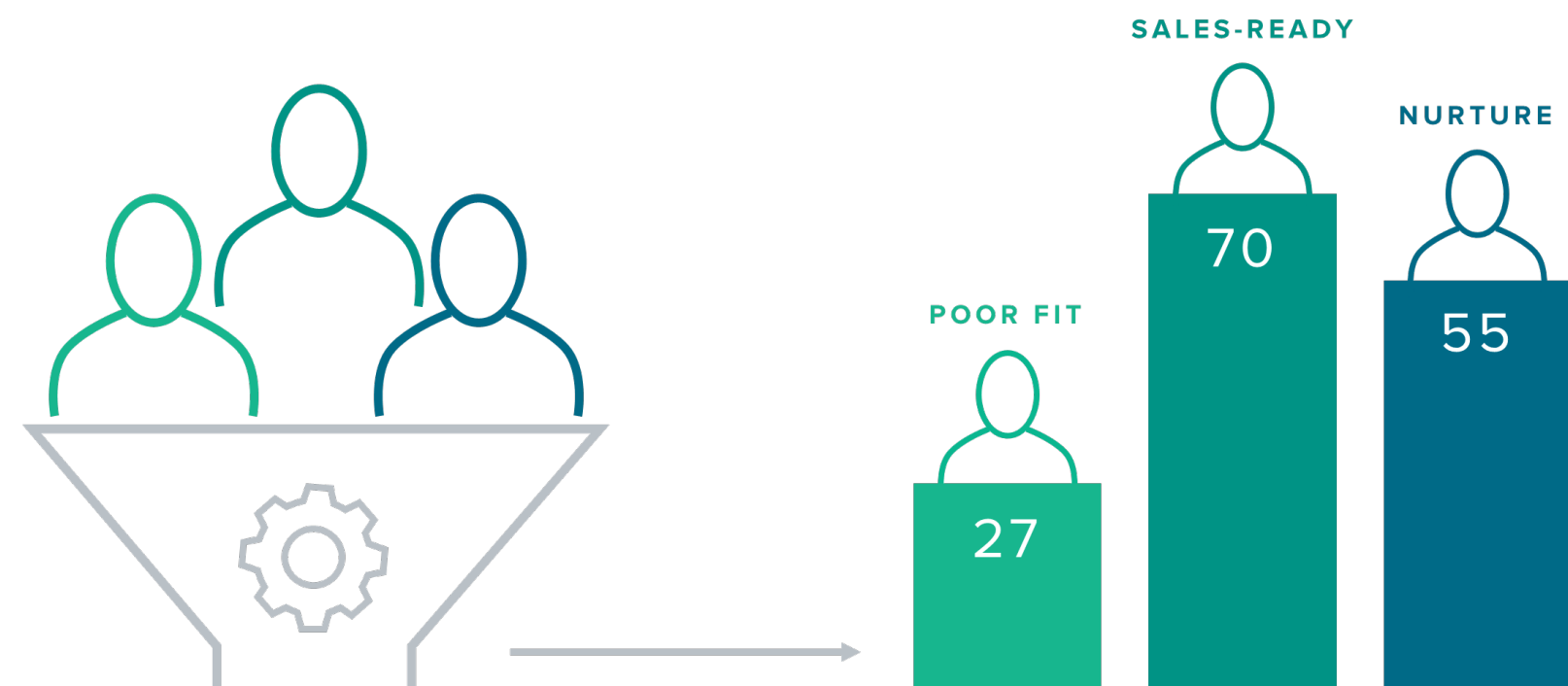**What data should we be using?**

How should we use it?

What can better results look like?

Analyze Your CRM Data

Pay attention to patterns

Sales data can surface insights, including:

− **Your typical depositors**

− **Your best lead sources**

− **Your average sales cycle**

− **Your data gaps!!!**

POOR FIT 27

SALES-READY 70

NURTURE 55

Garbage In Garbage Out

Leverage data from multiple sources

Your customer journeys span more channels than ever, so your data needs to be comprehensive

First-Party Data

Third-Party Data

Behavioral

Channel

Audience Segmentation

Predictive Analysis

DIRECT MAIL

DISPLAY

EMAIL

SOCIAL

DATA | INSIGHTS | ACTION

USING DATA TO INCREASE CONVERSION

Analyze Lead Behavioral Data

Behavior data can surface insights, including:

- **Leads who still need nurturing and education**

- **Messages that are resonating most with audiences**

- **Leads who are ready for the high-touch activities from your sales team!!**
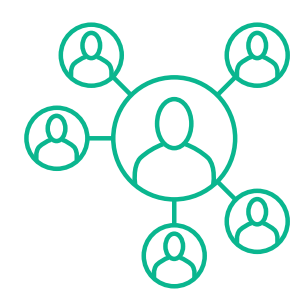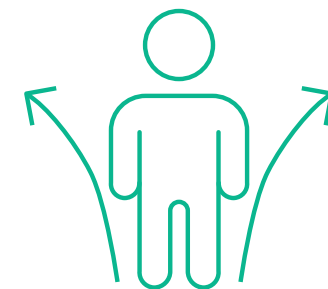
Integrate sales & marketing data

Combine sales data with marketing campaign data across all channels, then visualize the full funnel
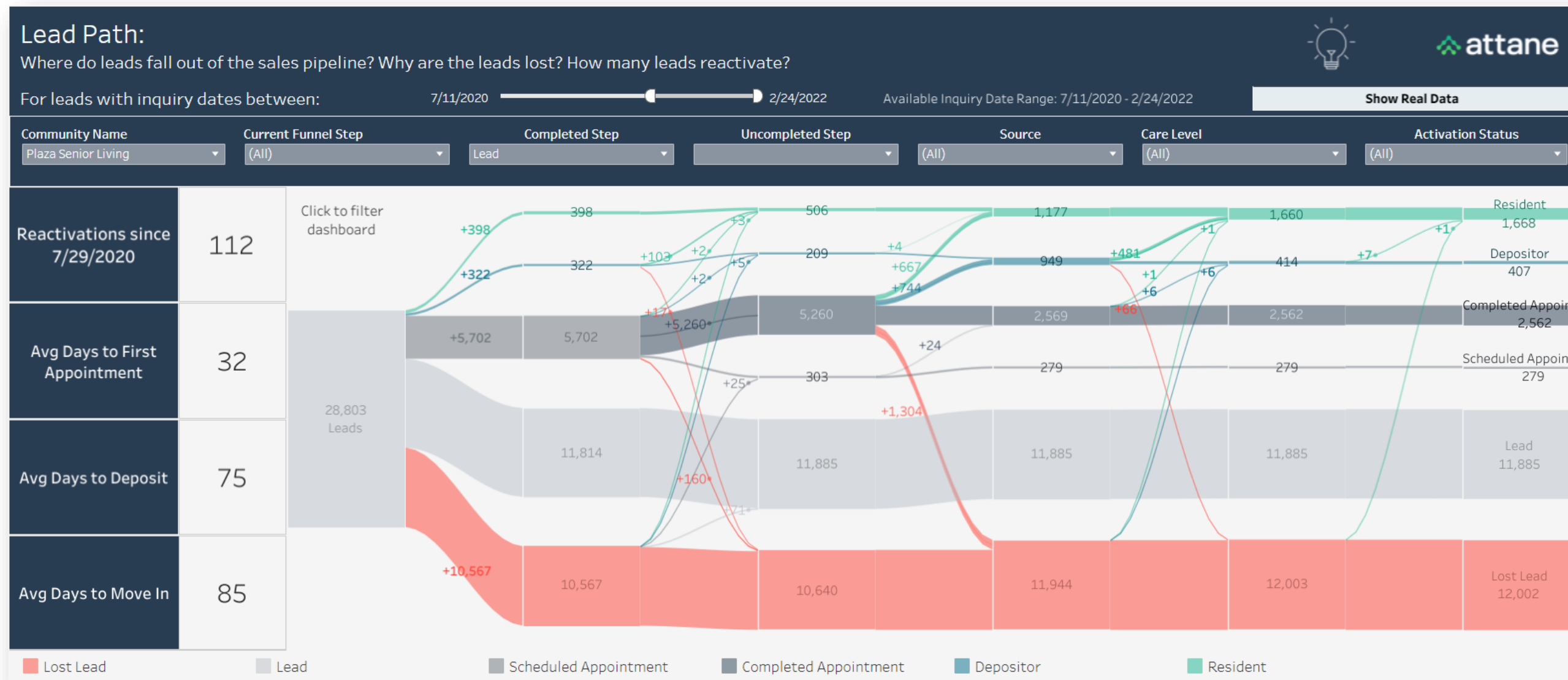
- Where are leads breaking down?

- How many lost or stalled leads can we reactivate?

- Which leads are making appointments & moving in faster? From which sources?

- Are we improving our average days to appointment & move in?

Analyze Your Website Data

- **How is your website traffic trending?**

- **Where are visitors engaging most on your website?**

- **Is your bounce rate moving in the right direction?**

- **How are conversion rates across each form?**

- **Are your form submissions generating qualified leads?**

AND THEN...

Data without vision, and *action*, is just a pile of numbers

USING DATA TO INCREASE CONVERSION

Use predictive scoring to focus your sales team

Identify sales-ready leads and close them faster

Notify sales of leads who are ready for the high-touch activities that drive relationships and sales.

POOR FIT
27

SALES-READY
70
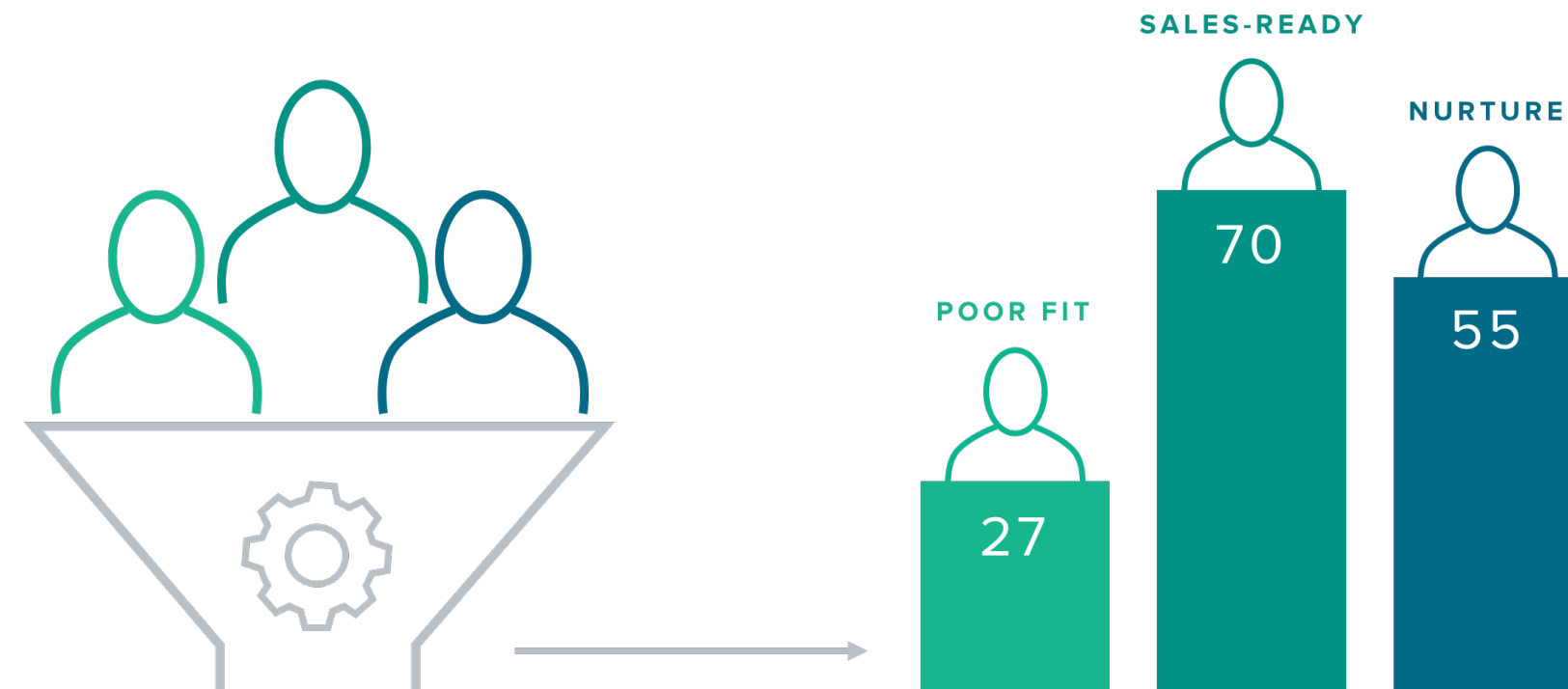
NURTURE
55

Nurture existing contacts and new leads

Advance more qualified leads toward an appointment

Nurturing programs help your team:

- Connect with leads more quickly

- Deliver relevant, helpful and timely content

- Provide personalized outreach at scale

- Gain visibility into your lead's digital journey

USING DATA TO INCREASE CONVERSION

Optimize keywords on paid search campaigns

Provide users with the most relevant results for their search query

Leverage data on how today's senior audiences are searching to drive quality
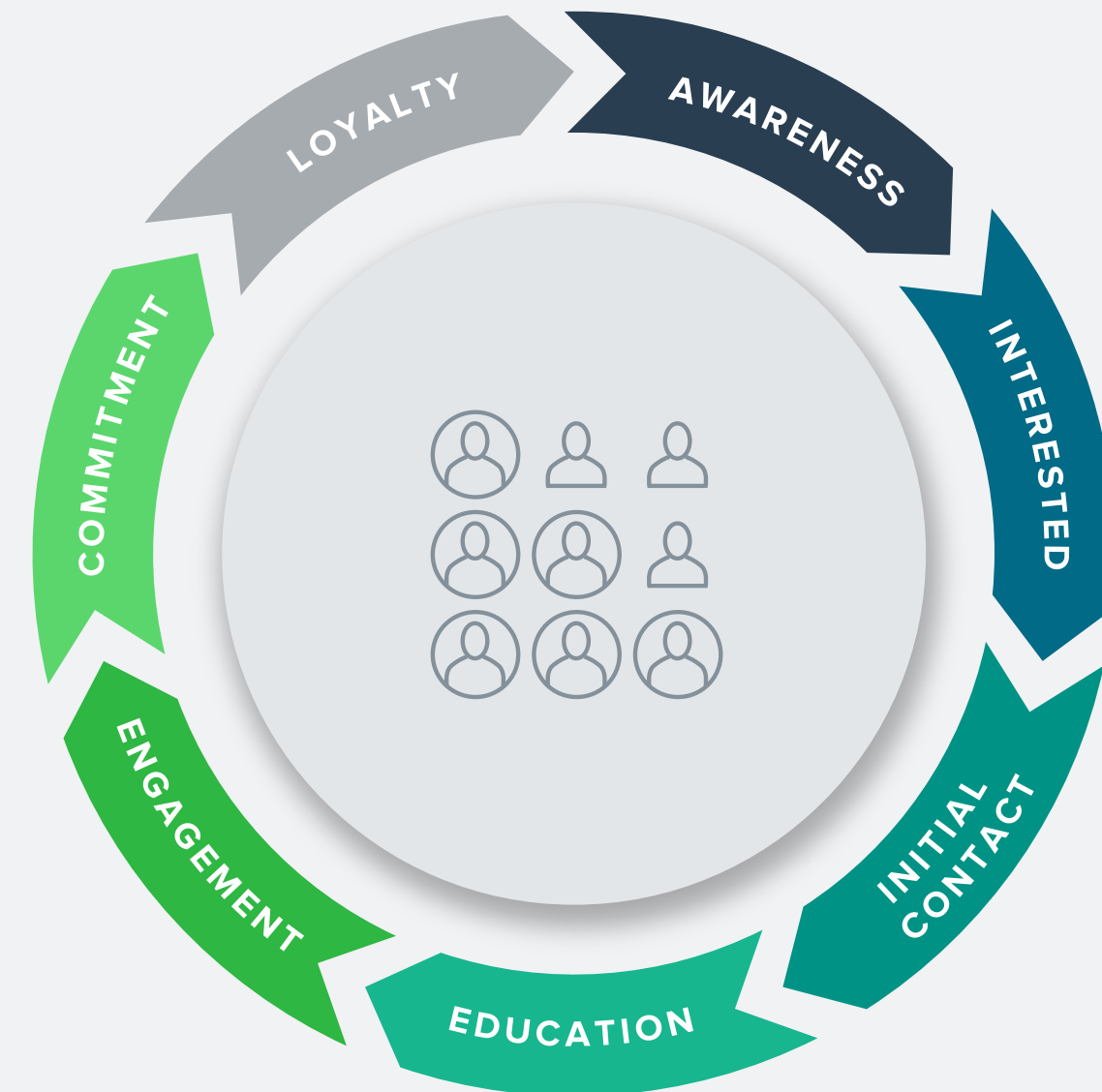
Ensure the right negative keywords are factored into your search campaigns

Evaluate your paid media landing pages for increased conversion

JOB & CAREERS EXAMPLE

Negative keyword
job
jobapplication
jobin
jobs

Negative keyword
career
"career builder"
careerbuilder
careers
"caring for"
careers

LOW-INCOME EXAMPLE

	Negative keyword
☐	"low end housing"
☐	"low incom"
☐	"low income"
☐	lowincome

	Negative keyword
☐	"sec 8"
☐	"section 202"
☐	"section 42"
☐	"section 8"
☐	"section eight"
☐	section8

USING DATA TO INCREASE CONVERSION
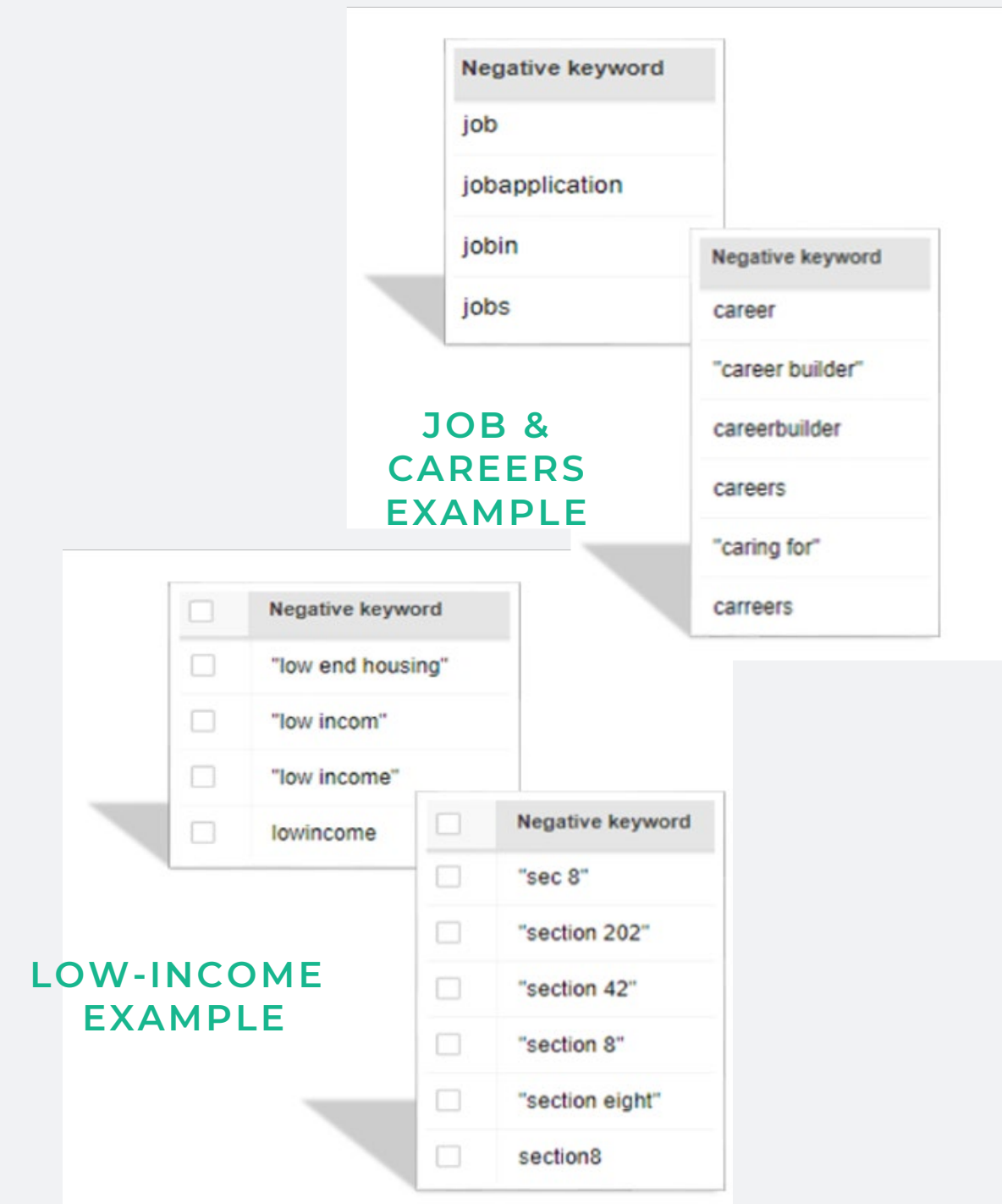
Create fresh blog content to boost conversion

Answer questions with informative blogs designed to advance buyers through their journey

Attract audiences through content they want to see, using touch points to build trust, credibility and momentum for your community

KEYWORD & SEARCH EXPERTISE

OPTIMIZED BLOG CONTENT

USING DATA TO INCREASE CONVERSION
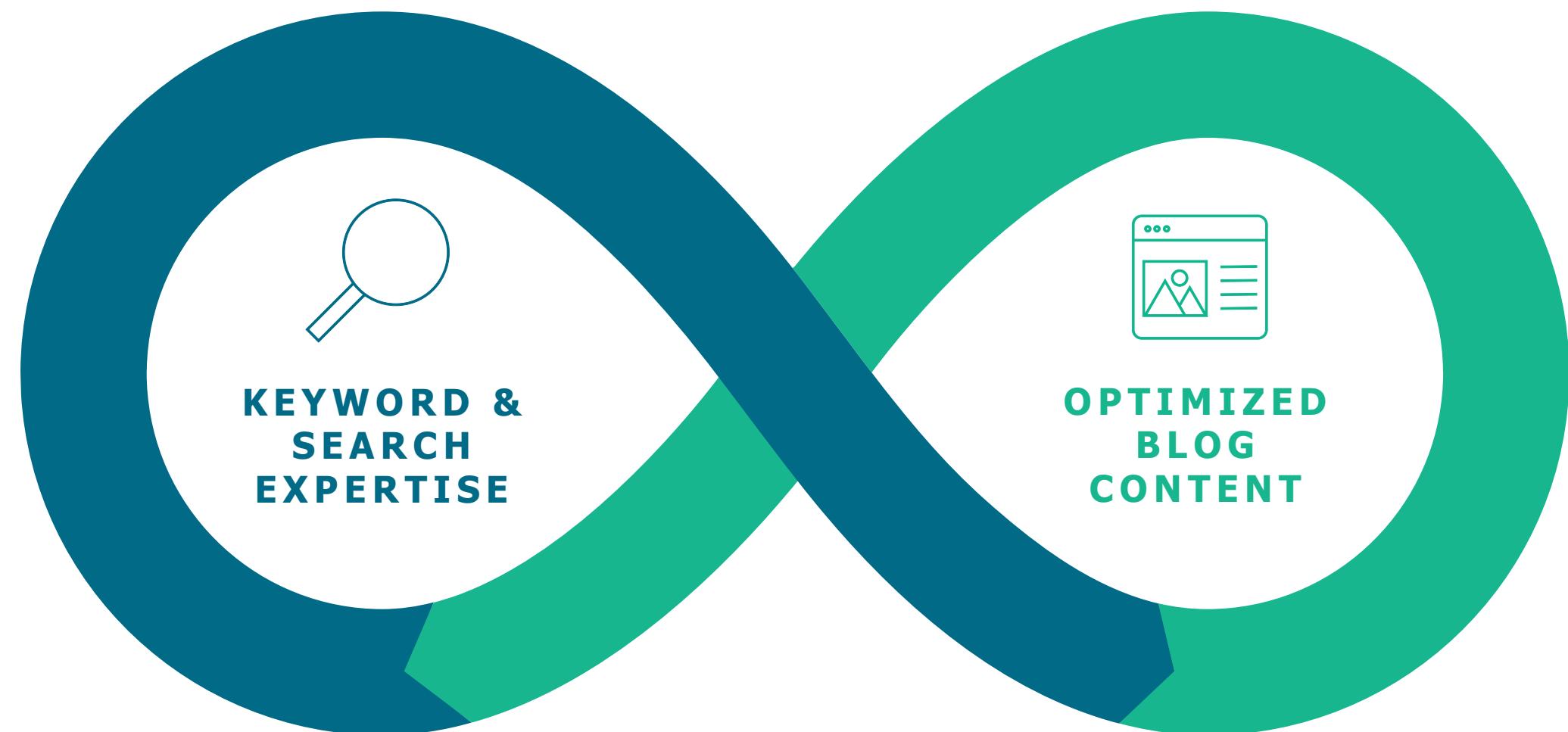
Revisit paid media budgets for your community

Optimize each location for budget and desired result

Paid Media results are very location and community-centric

Performance must be continually measured and optimized based on community goals

Factors that impact Paid Media:

- Location
- Competition
- Competitor bid levels
- Market Size (Rural, Urban, Suburban)

PPC Projected Results at Varying Media Spend Levels*

Leads Generated (y-axis: 0, 5, 10, 15, 20, 25, 30, 35)

x-axis: 100, 200, 500, 1500, 3000, 5000, 7000, 8000, 9000

— **Google Hard Costs**
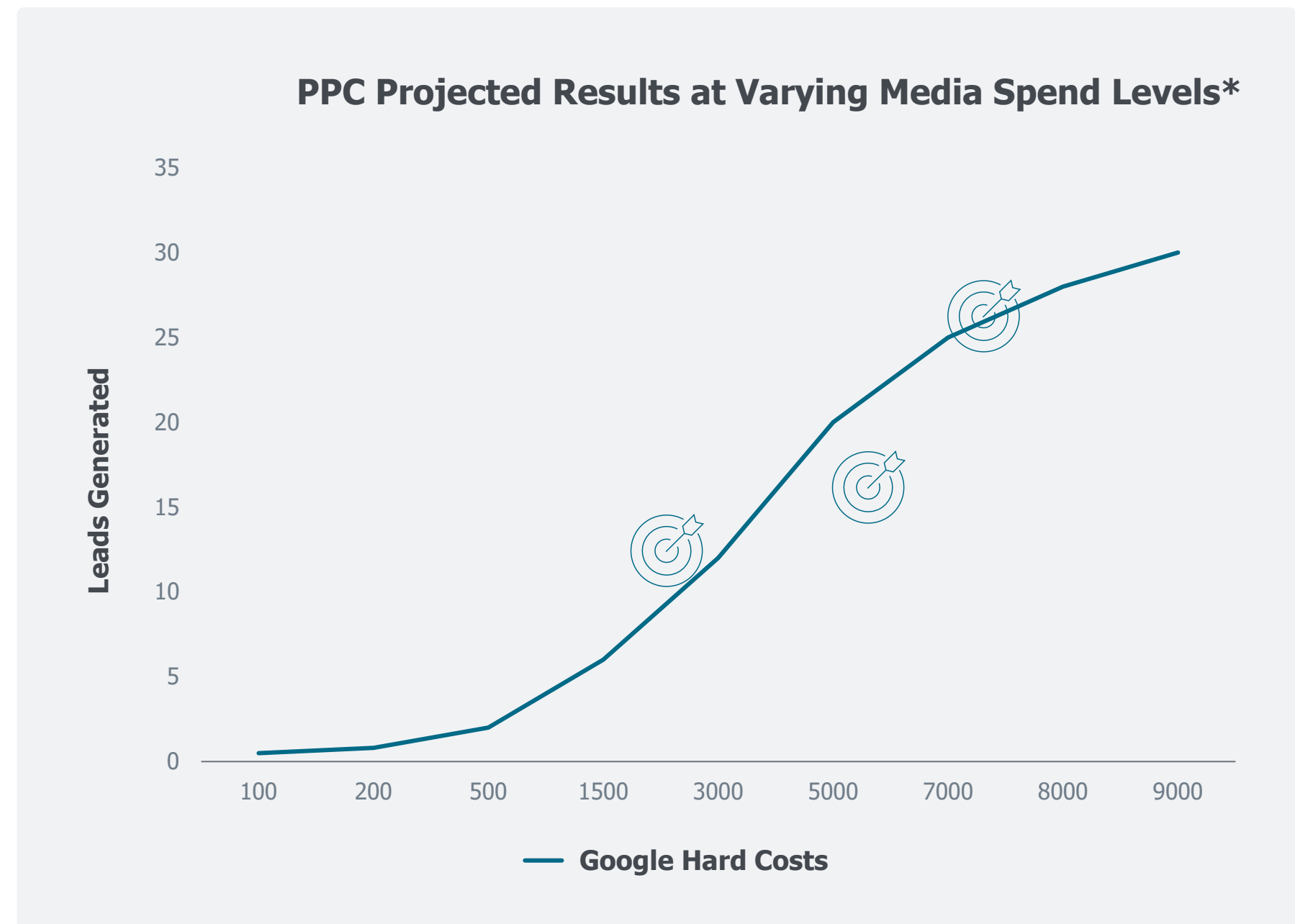
* Average cost per lead $250 in senior living (blended across care levels)

USING DATA TO INCREASE CONVERSION

Optimize your website usability and conversion points

Maximize the return on your website traffic

More Traffic   **More Engagement**   **More Conversion**

SEO   Content   CRO

Common areas for website improvement include:

Updating tags, alt text, schema markup and more to improve findability

Adding cost calculators, floor plans and community maps that drive user engagement

A/B testing on form designs to increase conversion

Refresh audiences across campaigns

Update your audience records multiple times each year to improve targeting and drive higher conversion rates

Stronger audiences help:

- ensure your digital ads reach qualified users and viable targets

- maximize lead and re-inquiry volume from direct mail

- remove nonviable prospects and add new qualified prospects

PSYCHOGRAPHIC

MARKET TRENDS

DEMOGRAPHIC

FINANCIAL

PURCHASE BEHAVIOR

USING DATA TO INCREASE CONVERSION

1. Use predictive scoring to focus your sales team

2. Nurture existing contacts and new leads

3. Optimize keywords on paid search campaigns

4. Create fresh blog content to boost conversion

5. Revisit paid media budgets for your community

6. Optimize your website usability and conversion points

7. Refresh audiences across campaigns

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Quick level set on today's reality

What data should we be using?

How should we use it?

What can better results look like?

For Friendship Village, our holistic marketing strategy creates solid results

THE SITUATION

Friendship Village has been THE standard for senior services in Greater St. Louis for over 40 years. But since the start of the pandemic their communities have faced extra occupancy pressure.

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The Action |

KPIs
Ongoing measurement and analysis of channel KPIs

SEO
Continued refinement of SEO keyword strategy to match user search intent

WEBSITES
Strategic enhancements to their websites to improve user experience

PAID SEARCH
Strengthened alignment between search queries and ad copy, which boosted engagement throughout their Paid Search campaigns

SOCIAL
Robust, social campaigns focused on brand awareness

DIRECT MAIL
Direct mail and events to drive targeted leads and re-inquiries

EMAIL
Automated onboarding email campaigns to accelerate leads to appointment faster

LEAD PREDICTOR SCORE TOOL
Attane's Lead Predictor Score tool to help the Sales team prioritize lead follow-up

The | Results

184% LEAD GENERATION

March 2022
New leads to fiscal year goal
through nine months

92% OCCUPANCY

April 2022
Independent living occupied + sold

13% *improvement since 2020*

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Protecting the bottom line while attaining new heights.

THE SITUATION

As a faith-based, not-for-profit, Continuing Care Retirement Community in the Kansas City metro area, Santa Marta's priority is to put every dollar to work in the most productive way possible.

THE ACTION

As the market evolved during the pandemic, we continued to be an outstanding steward of Santa Marta's marketing budgets by fully optimizing their campaigns to help drive the strongest ROI.

Plan Included

KPIs
Ongoing measurements and analysis of channel KPIs

PAID SEARCH
Monthly optimizations of paid search campaigns to drive digital conversions

SEO
Optimized SEO and owned social programs to boost organic leads

SOCIAL
Robust paid social campaign focused on elevating brand awareness for both IL and Health Services

DIRECT MAIL
Quarterly direct mail and event strategies

PRINT & PR
Quarterly print and PR placement to drive awareness in the Catholic community

EMAIL
Strategic marketing automation and email programs to engage and advance leads in the sales process

The Results

98% — Independent Living Occupancy Rate

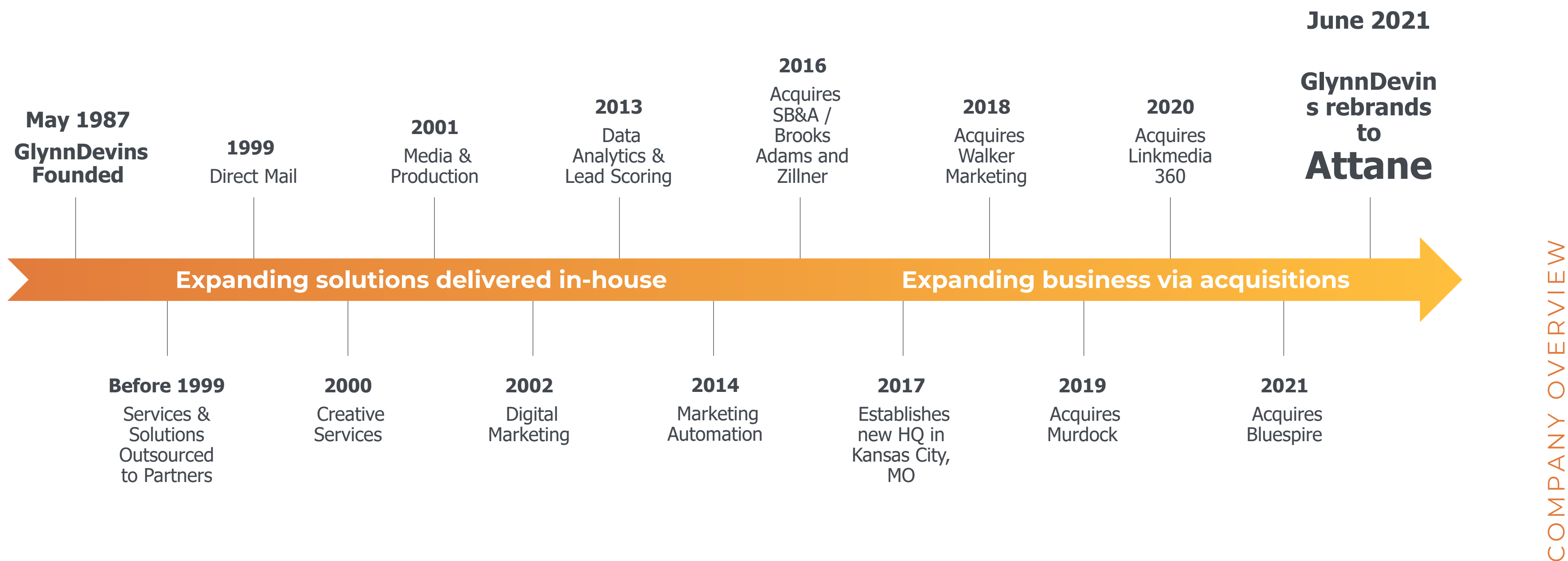**95%** — Total Occupancy Rate For All Levels Of Care

Santa Marta ℠

"Attane is a true strategic partner for our team at Santa Marta. From the early days before we opened to our thriving community nearly 20 years later, Attane has been our go-to marketing partner and continues to drive results. We trust Attane to continue optimizing our marketing programs and maximizing our return on investment as the market evolves."

- **Chet Surmaczewicz**

Executive Director/President at Santa Marta

Attane is the evolution of GlynnDevins

We continue our three-decade journey of providing marketing solutions to clients in senior living— driving qualified tours and appointments to fuel your business.

June 2021

GlynnDevins rebrands to Attane

2016
Acquires SB&A / Brooks Adams and Zillner

2013
Data Analytics & Lead Scoring

2018
Acquires Walker Marketing

2020
Acquires Linkmedia 360

May 1987
GlynnDevins Founded

1999
Direct Mail

2001
Media & Production

Expanding solutions delivered in-house

Expanding business via acquisitions

Before 1999
Services & Solutions Outsourced to Partners

2000
Creative Services

2002
Digital Marketing

2014
Marketing Automation

2017
Establishes new HQ in Kansas City, MO

2019
Acquires Murdock

2021
Acquires Bluespire

COMPANY OVERVIEW

Thanks for your time and attention!!

Attane is uniquely focused on this intersection to drive performance marketing
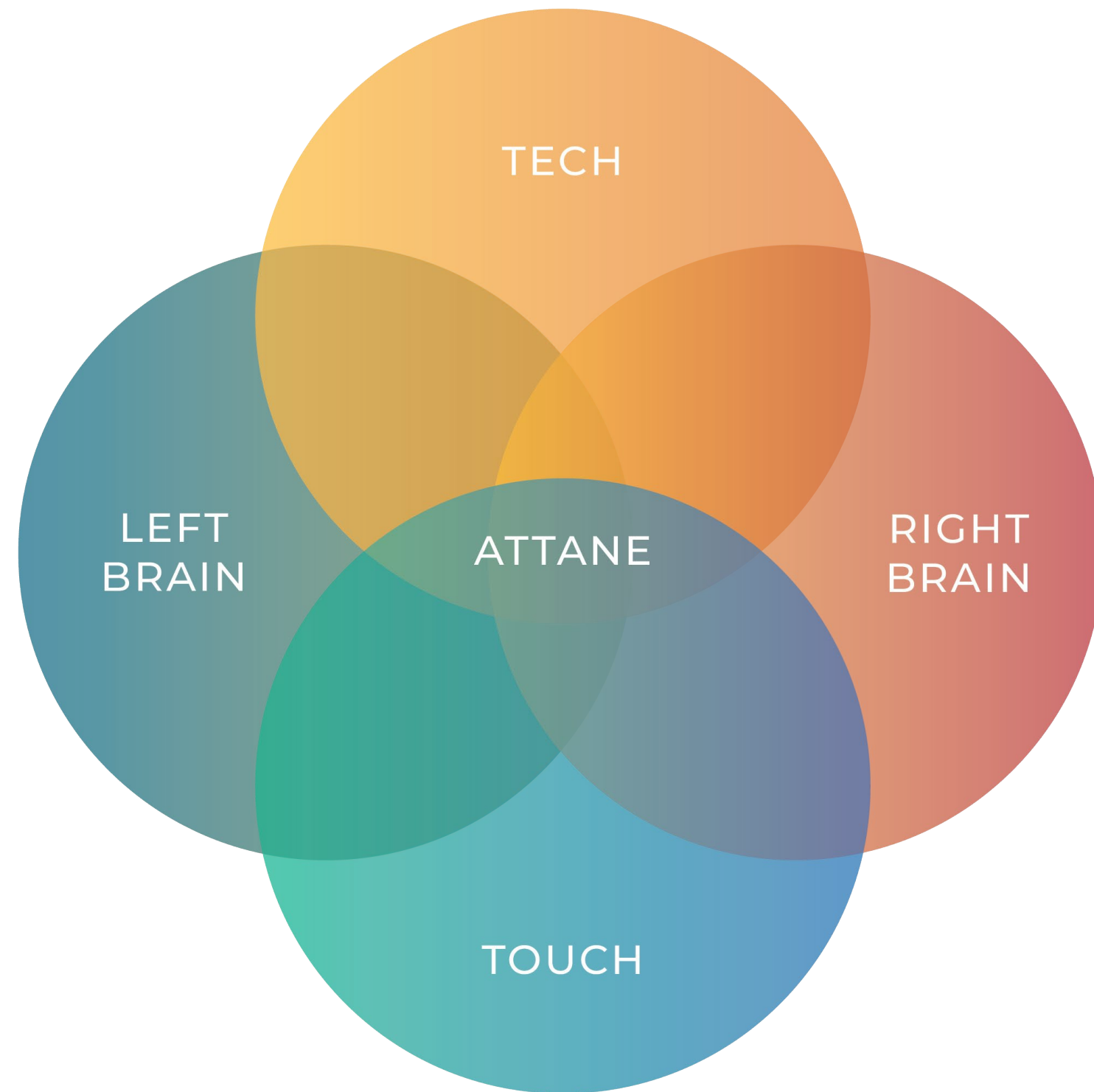
More data
More technology
More communities
More learnings
More expertise

Than anyone in the industry
...and it's not even close

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