CONTINUUM CRM™

CRM Selection Made Easy

How to Choose the Right CRM for Your Community

Many communities are seeking to replace their CRM system and considering their options.

What will we do? When should we do it? Who will help me navigate the options? How do I know I'm making the right decision?

Sound familiar? The team at Continuum CRM understands the thought of changing your CRM system is daunting. There are so many choices today in senior living CRM software it's difficult to know where to start.

CRM

Starting the Search

Choosing the right CRM system for your community is all about keeping the problem you're trying to solve in mind. Most people who approach us about switching to a new CRM usually have the following top priorities:

Ease of Use

This is important because we are comfortable with the familiar. Changing CRM systems is disruptive and we want our users to transition easily.

Better Reporting

Managers often want a way for the team to hold themselves accountable for achieving goals. Look for a system that delivers what you want on all levels of reporting from basic user to the C-Suite.

Refined User Experience

Sales and Marketing teams today don't function on recording activity alone. Seek a CRM that delivers role-based layouts and custom data fields. Systems that give the user a tailored experience, with data fields related to their daily tasks increases user adoption.

Multiple Service Line Support

Today communities operate many lines of service, perform community outreach, and manage census. Each line has its own set of data fields, workflows, and supporting reports. Choose a CRM that can deliver on the expanding markets your community serves.

Defined Sales Process

Senior Living counselors are no longer order takers. Competition is fierce. Having a defined sales process that everyone follows is the key to success. Whether you want a pre-defined process or want to build your own, make sure to implement a CRM that supports process.

Marketing Automation

The future of senior living marketing and sales involves automation. Whether it's having a more efficient way to send and track email, or deliver relevant content, select a tool that supports marketing automation.

Making Your List

Establish clear goals and expectations before you start shopping for a new CRM tool. Write down the problems you're trying to solve. Make a list of the features you'd like to have.

You don't want to get sucked in by a slick sales pitch only to find out after you've signed a contract that the CRM you chose can't meet your needs. Categorize your list items as follows:

Needs

Features and functions that solve your problems. You may have some flexibility as to how or when these needs are met, but they must be met.

Wants

These are the nice to have, but not 100% necessary features that probably won't influence your decision too much in either direction.

Deal Breakers

These are your requirements. The sub category of needs that have to be addressed in order to proceed. Without these features, there is no deal.

What About My Data?

One of the questions we hear most often from people looking for a new CRM is, “Will my data transfer?”

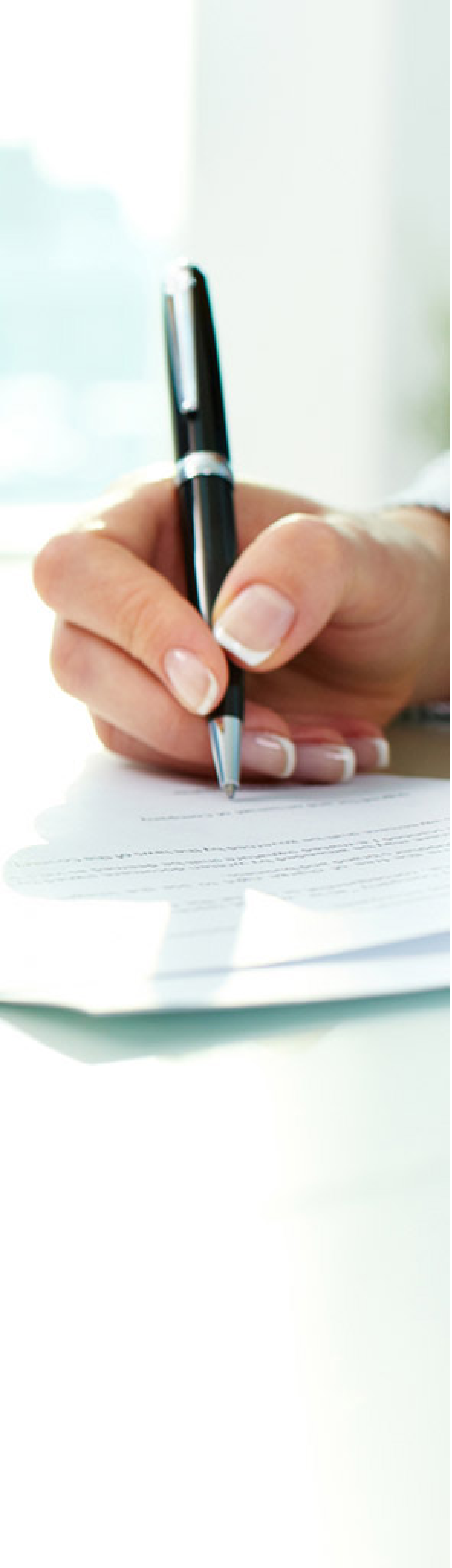
You’ve spent years amassing prospects, contacts, residents, notes, and much more. Being able to transfer all that history seamlessly into your new CRM application is a major concern.

Data Migration Questions

Make sure the vendor you select can easily move your data including your waiting lists and prospect activity history. Find out if they can execute the project and data transfer on their own or if they need to outsource that piece of the project.

Some questions to ask potential vendors:

- Do you have a reliable and robust process covering all facets of data migration including extraction, translation, cleansing and validation?
- Will you perform analysis and inspection of the information to validate data quality, and pinpoint required data and highlight gaps in the data from the current system?
- Are you well-versed in detailed mapping and transformation exercises to define migration rules, cleansing routines, and final execution plans?



Discuss Your Expectations Before You Sign a Contract

Whether your project is big or small, you should always have the following questions addressed before signing a contract with a CRM vendor:

- How long will the project take?
- What involvement and time commitment is expected from our users during implementation?
- How much and what kind of training can we expect?
- What kind of support do you offer long-term and do we have to pay extra for it?
- Is the CRM flexible enough to support future changes we may want to make in data fields, workflows, and reporting?
- Can we customize the software ourselves or will we have to pay you or a third party for any changes?

Knowing the answers to these questions before you commit will help you evaluate vendors and understand what to expect during implementation so you can plan accordingly.

Bear in mind, the process of vetting, selecting, and implementing a new CRM may take longer than anticipated. Budget at least 90-120 days to find a new CRM system, get up and running, and get trained.

Need Help Finding the Right CRM?

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