



Adventist Senior Living

takes control of retirement property sales and pipelines with CRM



At a glance

- Company** Adventist Senior Living Australia
- Industry** Aged Care Services
- Location** New South Wales
- Solution** Microsoft Dynamics CRM
- Function** Finance, Supply Chain, Sales & Marketing

Business Benefits

- A centrally-managed sales pipeline.
- Visibility of individual leads from initial contact through to property settlement and exchange.
- Professional, personalised sales communications.
- Better access to information is helping to reduce financial risk as the organisation expands its property portfolio.



Business Objective

Professionally manage the sales process across a growing number of sites and improve the quality, frequency and relevance of communications to leads, residents and other stakeholders.



Adventist Senior Living in New South Wales provides residential aged care services, catering to the needs of retirees at any state of their retirement, or at any level of health. Residents receive care from qualified and compassionate staff, live in high-quality facilities, and enjoy individualised services in locations that offer sought-after attractions and services. Adventist Senior Living is owned and operated by the Seventh-day Adventist Church.

GROWTH DEMANDS NEW LEVELS OF PROFESSIONALISM

The organisation maintains four retirement lifestyle communities within New South Wales. Two of these were only purchased in 2013, both of which are now under development. The expansion in the number of properties will help Adventist Senior Living to meet growing demand for retirement housing, but the move has also increased the complexity of the organisation's sales processes, said Lorin Bradford, Lifestyle Communities Manager, Adventist Senior Living, MMSV.

Until recently property sales were largely a matter for the site manager at each village. The manager maintained a list of interested prospects who would be contacted whenever a property was vacated or came back on the market. There was little formal documentation of the process and no consistency in the way sales communications were managed.

"Most of the information lived in the site managers' heads. The problem with this was we had an ad hoc approach that didn't always lead to the best customer outcomes," Bradford notes.

A CENTRAL SOURCE OF INFORMATION

With a growing portfolio of properties to manage and a corresponding increase in financial exposure, Adventist Senior Living management knew they had to adopt a far more professional and structured approach to sales and obtain greater visibility of the sales pipeline. Bradford was asked to look for some kind of software system that could help achieve this.

Bradford says, “I looked at a number of options, but each time came back to Microsoft Dynamics CRM [customer relationship management] because I liked the way it is so customisable. I wanted to be able to add fields as required. It also had the benefit of integration with Outlook, Excel and Word.

We do a lot of direct mail, so we wanted something that would allow us to easily conduct mail merges and to analyse the data we were capturing. Also, as a hosted system, it was very reasonably priced and scalable.”

The latter point was particularly important for Adventist Senior Living, as they have no IT department, choosing to outsource all of its IT requirements to a local company. The selection of a hosted CRM could be an important step in minimising the complexity and cost of introducing a new system.

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“We had no qualms at all about going to a hosted system. IT isn’t our core business and hosted systems have been in the marketplace long enough for people to have faith and trust in them. Microsoft has so much credibility in the commercial market, we would have been crazy to look anywhere else,” Bradford adds.

To help design, customise and set up the system, Bradford turned to Microsoft and business technology experts, Professional Advantage.

“There had been a previous relationship with Professional Advantage, so they already knew us and were able to get going virtually straight away. The consultant was brilliant to work with. He really knows his stuff. I outlined what we wanted to do and in some instances, he suggested better ways to go about things. Even though we were creating a fairly heavily customised system, he got it up and running within three days,” Bradford smiles.

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Lorin Bradford, Manager



CRM IN ACTION

Adventist Senior Living began working with the Microsoft Dynamics CRM system in mid-2013. The CRM is used to record all expressions of interest in properties, including those that may come back on the market in the future or those that are still being built. It captures data ranging from names and contact details of prospects and the location they are interested in, right down to the specific lot number they may be hoping for. Contacts are then prioritised based on criteria such as deposits paid or the length of time since the expression of interest was made.

Every time the organisation calls someone, sends out an email, a site update or a promotional flyer, it is recorded in the system. Every interaction is noted.

“I think the main benefit we’ve found is that it is allowing us to manage our customers in a more professional manner. Our ability to mass communicate has lifted dramatically. We can create very personalised direct mail letters or send updates on development at a village to each contact.



The information we capture is giving us far better continuity of service because if anyone goes on leave we can see previous correspondence and identify any issues that may need to be followed up,” Bradford says.

Six months after going live, Adventist Senior Living’s CRM contains roughly 1,000 leads, 500 of which are active. Dashboards and reports drawn from the system enable the board, Bradford and other managers to readily identify how the organisation is performing against annual and overall financial targets.

“We know the number of leads that need to be processed to achieve the required number of deposits. We can follow a contact through the system from lead through to exchange of contract and settlement,” Bradford states.

CONTINUOUS IMPROVEMENT

The early benefits of CRM have encouraged the organisation to explore new ways of using the system. In late 2013, for example, Professional Advantage was engaged to help create a facility within CRM to manage villa maintenance.

Using a customised version of the service functionality already resident within Microsoft Dynamics CRM, the changes are enabling Adventist Senior Living to monitor individual property requests such as cleaning, lawn maintenance, assistance changing light bulbs, carpet replacement and servicing or repairs of equipment. Service managers can review the data on a regular basis to identify outstanding service calls or overdue actions.

The recording of maintenance records will assist in the development of preventative maintenance programs and will add to the authoritative picture that is now emerging of residents, prospects and properties.

Bradford believes there will be further expansion and change to the system in the years ahead, such as integration between Adventist Senior Living’s website and CRM. More importantly however, he says, “We have a growth strategy that will see us add and build further villages over the next five to ten years. With a little help from Professional Advantage, this system will help us do that professionally and painlessly.”



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