



WelcomeHome
YOUR SENIOR LIVING CRM



Leveraging a customized Senior Living CRM system: How The Arbor Company exceeded the market rate of Inquiry to Move-in with WelcomeHome

The Arbor Company, an Atlanta-based operator of more than 45 independent living, assisted living and dementia care communities, serves seniors in 11 states. With more than 30 years of dedication and experience, The Arbor Company strives to deliver the highest quality care and service to residents and their families, has been designated a Great Place to Work® and is listed on the Fortune Best Workplaces for Aging Services™.



36%
rate of Inquiry to Tour

Surpassing market rate of 29%



9.3%
rate of Inquiry to Move-in
Surpassing market rate of 7.6%



99.5%
Speed to Leads
Contacting leads within 10 minutes of inquiry

THE CHALLENGE

In the midst of the pandemic, The Arbor Company's response was swift and intentional. No longer business as usual, they searched for the best course of action to meet the needs of their current and potential residents, families and staff, including:

- The ability to transition to remote work when required
- Supporting the sales team to effectively increase, qualify and recapture leads
- A quick response to prospect inquiries
- Understanding their prospects at a deeper level
- Improving move-in rates
- Assisting investors with up-to-date data

In a rapidly shifting environment, they realized technology had the capability, but any system would need to be user-friendly, increase efficiency and align specifically with the unique requisites of a senior living community.

“Implementing the new CRM system contributed to the competitive advantage we enjoy today. We are currently experiencing the highest move-in rates in the company's history, with 14 months of growth.”

Kelley Skarp
SVP of Sales & Marketing
The Arbor Company





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THE RESULTS

The Arbor Company knew rapidly responding to prospective residents while honoring their unique preferences would provide a competitive advantage. The right software could be instrumental. When they discovered a CRM designed specifically for senior living, the decision was made.

Implementing WelcomeHome's innovative system supported Arbor to accomplish:

1. Integrating all of their systems for cross functional collaboration while continuing to provide efficient and personal service.
2. Building solid connections between the sales and marketing teams, executive directors, prospective and current residents and their families.
3. Creating month-over-month occupancy growth with record breaking months of move-in volume.
4. Being named a Great Place to Work[®], receiving a 93% score from their sales and marketing team for having the resources and equipment needed to do their job.

The Arbor Company's Story

Commitment to relationships is at the heart of every Arbor community. Working with WelcomeHome to capture decision criteria, care needs, interests and hobbies of potential residents kept those quality connections in focus. Everything learned could be accessed at a glance and easily referenced for future activities or opportunities.

Automating data entry and other daily tasks also meant Arbor could spend more time where it really mattered — with residents, prospects and their families who may desperately be searching for the right community.

The Advantage of a Customized Senior Living CRM System

The Arbor Company recognized their sales and marketing team as one of the driving forces of their continued success and placed a priority on supporting them. They also knew working with WelcomeHome would champion those efforts as well.

The foundational beliefs of the software company illustrated a genuine understanding of the industry's specific challenges:

- Senior living sales is one of the most difficult jobs today
- Existing tools aren't helping make it any easier
- A software can be sophisticated but still simple to use

The benefits for Arbor were quickly apparent as the dedicated sales team soon surpassed the market rates for Inquiry to Tour and Inquiry to Move-in, while achieving a 99.5% rate for contacting leads within 10 minutes of inquiry.

Teaming Up: The Expertise of Arbor with WelcomeHome's CRM

Another bonus? Arbor was able to create a consistent operational process for their teams and prospective residents, regardless of the specific community, which greatly contributed to efficiency and a quality experience for everyone.

Additional benefits contributing to the success of Arbor's daily operations include:

- A stress-free process for shifting to virtual sales
- Seamless integration of the software with their EMR and billing systems
- The ability to email, call and text without needing to leave the CRM
- Saving up to 8 hours a week in staff time by automatically generating and delivering investor reports
- A mobile app that allows work to occur from anywhere at any time

"The system provided everything we needed to assist our sales team, prospects and their families to find the right community," said Arbor's SVP of Sales and Marketing, Kelley Skarp. "We're able to outpace the industry in generating new resident interest and move-ins."

The CRM challenge is not necessarily in collecting streams of data but in making sense of it. The partnership between Arbor and WelcomeHome resulted in getting relevant information to the right people at the right time—with the ultimate outcome of increased leads and record occupancy growth.