Customer Relationship Management

Improve lead and referral source management anywhere, anytime.

Available in Canada

PointClickCare Customer Relationship Management provides senior living providers with an easy-to-use tool to help track inquiries and referrals; gain real-time visibility into availability and occupancy; and decrease the transition time from prospect to resident.

Inefficient and manual processes to track inquiries and referrals puts an organization’s service delivery and profitability at risk. Organizations look to Customer Relationship Management solutions to ensure leads are not missed or forgotten and, more importantly, that they are addressed in a timely manner to avoid losing them to the competition. By automating the lead management process, organizations leave more time for sales representatives to focus on nurturing quality leads and retaining and developing relationships with strategic referral partners.

What is PointClickCare Customer Relationship Management?

PointClickCare’s Customer Relationship Management solution provides a truly unified view into every aspect of a potential resident, throughout the pre-admission and move-in process. It ensures that residents are placed at the right location according to their preferences and care delivery needs. It also enables providers to centrally manage their resident referral pipeline, eliminate the duplication of effort and manual paper-based processes, and provide better information to support decisions regarding marketing efforts. Which in turn, helps organizations nurture and retain new resident populations and ensure occupancy levels remain optimal.
Customer Relationship Management provides:

- Real-time availability and occupancy at a glance.
- Simplified, integrated referral pipeline management.
- Easy-to-use reporting dashboards and exports.
- Quick access to contacts and referral Sources.
- Lead and marketing activity scheduling, tracking, and reporting.
- Anytime, anywhere access to leads and referrals via iOS devices.
- Expedited admission processes, with resident-specific data acquired from first contact.

Maximize Your Efforts with Reporting & Dashboards

The dashboard view provides key metrics at a glance. Users can view filterable snapshots and reports related to Open Leads, Referral Sources, Conversion Rates and more. Users can export and drill into details, helping them, and you, understand which sources and activities are helping to build referral pipelines the fastest. The reporting functionality allows staff to track activity completion and lead conversion rates to monitor sales performance and marketing efforts. These metrics can be used to forecast trends across one or multiple locations in order to make informed decisions about the organization’s resident referral pipeline.

Mobile Access for a More Mobile Workforce

Providing staff with mobile access to PointClickCare’s Customer Relationship Management and Availability and Occupancy applications allows users to access key information in order to accelerate the conversion of leads to residents, and expedite the move-in process. It also allows users to collect vital resident information, external contacts, resident preferences, and access the level of care they require via both web and mobile applications.
Capture Leads at the Click of a Button

Capture key data to ensure resident needs and preferences can be met, in order to help nurture healthy relationships and covert leads to residents.

Stay on Top of Referral Sources

Track referral sources to help build your pipeline and gain a better understanding of which referral relationships are most crucial to maintain. Tracking referral sources can also help organizations analyze marketing efforts and help tailor future campaigns to specific partners to maximize returns.

Schedule Activities for Staff to Complete

Effective and timely communication is the key to building healthy relationships with prospective residents. Keeping staff focused on communication will ensure your pipeline is continuously moving. With PointClickCare’s Customer Relationship Management application, users have visibility into all their assigned activities, both current and overdue, including emails and calls.

Speed up the Pre-admission/Move in Process through Automation

By capturing and auto-populating resident information directly within the PointClickCare platform, providers can streamline the pre-admission process, ensuring relevant data is accessible at the time of admission, and improving communication and coordination among team members. This eliminates duplicate data entry and improves the organizations’ overall data integrity.

Track Availability and Occupancy on the Go!

Optimal occupancy starts with having an up-to-date understanding of your organizations’ availability thresholds.
PointClickCare’s Availability & Occupancy application works in conjunction with Customer Relationship Management to provide a dashboard view of the availability and occupancy levels across one or multiple locations. It gives users the ability to quickly and confidently place or hold resources in a care setting appropriate to a prospective resident’s needs.

**How do providers benefit?**

**Increased Occupancy Rates** – Identify high value referral sources to focus marketing efforts on the referrers that provide the biggest impact to the bottom line.

**Improved Care Delivery** – Advanced room/location search functionality ensures that prospective residents are placed in the right setting to deliver the care and services appropriate to their needs.

**Enhanced Efficiency** – Schedule activities, prioritize schedules, and manage referral partners to ensure your staff is spending their time nurturing and closing the right references.

**Strategic Planning** – Identify missed opportunities for conversion by capturing information related to service or care delivery, capacity, and/or location preferences.

To learn more about Customer Relationship Management, contact your PointClickCare Account Representative today, call 1.800.277.5889 or complete the form [www.pointclickcare.com/contact-us](http://www.pointclickcare.com/contact-us).

PointClickCare is helping over 13,000 long-term and post acute care (LTPAC) providers meet the challenges of senior care by enabling them to achieve the business results that matter – enriching the lives of their residents and patients, improving financial and operational health, and mitigating risk. PointClickCare’s cloud-based software platform is advancing senior care by enabling a person-centered approach to care, connecting healthcare providers across the senior care continuum with easy to use, regulatory compliant solutions for improved resident outcomes, enhanced financial performance, and staff optimization. For more information on PointClickCare’s ONC certified software solutions, please visit [www.pointclickcare.com](http://www.pointclickcare.com), or follow us on Twitter @PointClickCare.

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