

## Solution Sheet

# Customer Relationship Management (CRM)

**Provides senior living communities with an easy-to-use tool to increase occupancy.**

Track inquiries, manage leads, gain real-time visibility into occupancy, and decrease the transition time from prospect to resident using Customer Relationship Management (CRM).



Inefficient and manual processes to track inquiries and referrals put an organization's service delivery and profitability at risk. CRM ensures leads are tracked and addressed in a timely manner to avoid losing them to the competition. Reduce administrative tasks by leveraging your CRM contact lists to integrate with HubSpot® for marketing and engagement tracking. CRM reports and dashboards provide a complete view of lead status and activities.

## What is PointClickCare Customer Relationship Management?

PointClickCare's **Customer Relationship Management** solution is designed for the senior care industry. With an easy, intuitive way to input, track and manage leads and referral sources to improve pipelines, CRM delivers a personalized experience to prospects to increase occupancy.

Gain complete visibility into your sales and marketing activities to improve sales conversions. Fully integrated into PointClickCare's EHR, data is captured before move-in, providing seamless transfers for the resident and ensuring optimal care and services planning.

### Customer Relationship Management provides:

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Integration with HubSpot lets marketing sync contacts and track engagement.

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Sync with Outlook and Google Calendars consolidating meetings in a single location.

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Real-time availability and occupancy at-a-glance.

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Simplified, integrated lead pipeline management.

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Easy-to-use reports and data exports.

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Quick access to contacts.

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Lead and marketing activity scheduling, personalizing, tracking, and reporting.

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Anytime, anywhere access to leads and referrals via mobile devices.



## Maximize Your Efforts with Reporting and Dashboards

The dashboard view provides key metrics at-a-glance. View filterable snapshots and reports related to open leads, lead sources, conversion rates and more. Export and drill into details, helping to understand which sources and activities are building 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 an organization's resident lead pipeline.



## Mobile Access for a More Mobile Workforce

Providing staff with mobile access to PointClickCare's CRM, allows users to access key information in order to accelerate the conversion of leads to residents. It also allows users to collect vital resident information, external contacts, and resident preferences 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 convert leads to residents.



## 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 CRM application, users have visibility into all their assigned activities, both current and overdue, including emails, calls and tours.



## Speed up the Move-In Process Through Automation

CRM is now integrated with Document Manager so you can easily create and send move-in documents from the EHR. Captured resident information is auto-populated directly within the PointClickCare EHR platform, so communities can streamline the move-in process. Email paperwork for signature in advance ensuring relevant data is accessible at the time of move-in and improve communication and coordination among team members, eliminate duplicate data entry and reduce administrative overhead.



## Conduct pre-move in assessments for a prospect right in the system

A single platform, your EHR and CRM are connected so you can conduct assessments and update records to prepare for move-in, so the focus is on the resident instead of the paperwork.

**SCHEDULE YOUR DEMO**

PointClickCare Technologies Inc., helps long-term and post-acute care (LTPAC) providers gain the confidence they need to navigate the new realities of value-based healthcare.

For more information on PointClickCare's software solutions, please visit [www.pointclickcare.com](http://www.pointclickcare.com)