

Left Brain.



Right Brain.



Two great partners.
One unique approach for the senior living industry.



Quarterly Marketing Planning!

Annual marketing plans are pretty much routine for many senior living communities. After all, it's important to develop a blueprint for the key strategies you will deploy throughout the year and especially to know in advance the budget you have to work with. But while annual marketing plans are essential, they are also fluid and subject to course corrections throughout the year. That's why, for each of our clients, Solutions Advisors conducts quarterly marketing planning sessions. Quarterly planning allows you to look back at past quarters and quickly assess progress or lack thereof, and to continue the same course if successful or alter marketing strategies as necessary.

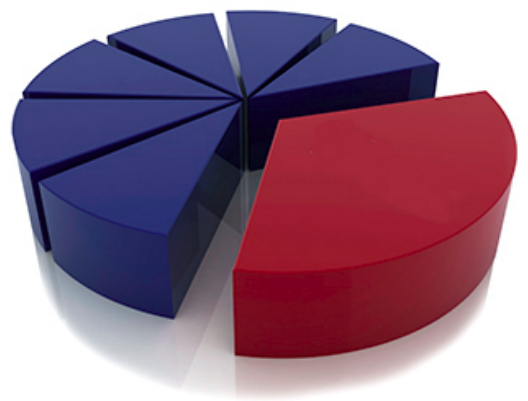
Spend Wisely



For example, your annual marketing plan may call for weekly or monthly advertising in a certain publication. A three-month evaluation, however, shows that the publication is not generating qualified leads. Should you continue to advertise or alter your course? **Without a quarterly assessment you might never know that your advertising dollars are being spent unwisely.** Conversely, as new opportunities arise you want the flexibility to be able to take advantage of them, rather than to be locked into an annual plan.

Market Strategy

Quarterly plans also enable you to **evaluate sales productivity and compare key indicators in order to set or modify strategies** on a month to month basis. Some of the key indicators we track include lead source for move-ins and prospects as well as lost leads; lead source by zip codes to show whether the market area has expanded or contracted; gestation, meaning days in the lead base and numbers of contacts before a sale; and a cost per lead and move-in analysis. We also revisit the SWOT (strengths, weaknesses, opportunities and threats) to ensure that marketing strategies are emphasizing strengths and addressing opportunities.



Know the Trends




Quarter to quarter comparisons will reveal trends and help you evaluate your marketing and sales strategies in order to make course corrections throughout the year. For instance, if leads were low in the first quarter, you would want to develop strategies to generate more leads in the second quarter. If appointments were down, you may want to increase outbound calls in an attempt to generate more appointments. Without quarterly planning, you increase

the possibility of falling further behind each month without understanding why or being able to make mid-course corrections.

Plan SMART

Solutions Advisors recommends setting **SMART goals**, that is, goals that are **Specific, Measurable, Achievable, Realistic** and **Time-lined**. Don't set yourself up for failure; know what you can achieve based on historical trends and set realistic goals that set the stage for short-term progress and long-term success!



For more information on how to develop quarterly marketing plans, please visit www.solutions-advisors.com or call 888-312-0889.