



Resident Marketing

The Resident Marketing module is a comprehensive data collection and analysis system that interfaces with the Admissions and Billing modules. This module features a marketing profile, which includes demographics, communications history, marketing codes, sales information, family/contacts, prospect interests, wait list data, and financial information. Profile search options by Prospect or Contact are easily accessible. Other features include:

- A single profile for husband and wife in marketing but will create individual profiles when transferred to admissions.
- Offers one facility type per couple or different facility types if the situation demands. The profile remains one profile for the couple with different preferences for each individual.
- The wait list process offers a date and unique sequential number to be assigned to each prospect.
- The wait list has an unlimited number of unit type preferences for each prospect plus an historical record of units that have been turned down. Units may also be reserved in advance. Wait lists can be queried by unit preference, location preference and seniority on the list.
- Provides an excellent analytical tool to dissect the database for specific information by using user-defined ranges and sorting techniques.
- The marketing profiles can be ranged and/or sorted by action plan, cancel reason, contact type, interest code and level, location preference, marketing area and method, marketing staff, potential rating, prospect type or resident code.
- When contacts phone in, the profiles can be searched by contact names for easy and quick access.
- Contact history in the profile offers a complete record of previous activities and also lets the user set automated recipes for different future scenarios. Once the recipe and date are recorded, the system will populate the rest of the activities and due dates associated with that recipe.
- A tickler file is created for users to find activities on individual prospects, a specific day's activities or a specific marketing staff member.
- Sales deposits and information gathered plus all other relevant information is transferred to admissions at move-in.
- The marketing profiles are also added to the Donor Development module if selected during setup.
- Mail merge, labels and selective criteria reporting are also standard features in this module.
- Offers Referral Tracking which keeps track of those individuals or businesses that refer prospects to your facility.

Reports

- Actions Due Report/Labels
- Actions History Report
- Action Plan Report
- Action Statistics
- Apartment Master Listing
- Birthday/Anniversary Report
- Church Master Report
- Communication History
- Daily Communications Report
- Family Contact Report
- Financial Data Report
- Marketing Cost Report
- Marketing Activity Analysis
- Method Statistics Report
- Monthly Marketing Report
- Move-ins by Marketing method
- Profile Condensed Listing
- Profile Labels from Select
- Profile List
- Profile Master Report
- Profile Statistics
- Prospect Interest Lists
- Sales Activity Matrix
- Sales/Deposits Register
- Search Unit Preferences/Vacancies
- Wait List Register
- Weekly Marketing Report

Integrates with

Admission & Census, 1st and 3rd Party Billing, Donor Development, Resident Billing and Work Orders.

Key Features

All tables have the ability to be modified to meet the individual needs of the facility.

Range and Sort options allow user to query the data in a multitude of user-defined options.