

Alex Fisher, co-founder and president of Sherpa, explains how sales technology can support the care sector's recovery



Bouncing back

Care home providers are cautiously looking to emerge from the Covid-19 pandemic and rebuild financially. Occupancy levels have fallen, and volumes of new move-ins and enquiries are far lower than in previous years. Negative media coverage and fears around infection have made also the already difficult decision to move into a care home more complicated for prospective residents and their families.

However, developing meaningful sales relationships between buyers and sales professionals – ones built on trust and empathy – is a highly effective way to support recovery both for individual businesses and the wider sector.

Technology can play a key role in nurturing these relationships, helping to generate higher sales conversions and increase occupancy levels.

From the connections between carers and current residents, to salespeople and general managers supporting someone through a buying decision, mutual understandings of trust and empathy are the foundations of the care sector.

Successful care sales teams invest time and energy into understanding the unique needs and concerns of each individual.

They use their customer relationship management (CRM), not only as a system of documentation and record collection, but also as a tool for engagement. It can help plan the next steps that will be most effective in supporting their prospective resident's unique buyer journey.

One of the engagements that we find most effective is creative follow-up, in which a sales interaction is followed

by a thoughtful offering like a personal letter or a thoughtful gesture that helps the buyer feel heard and valued.

This method of outreach is informed by data in the user's CRM, where the time spent planning the follow-up is also recorded.

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An analysis of the Sherpa CRM user base from 2020 found that the best sales performers spent 24% more time engaging in creative follow-ups than average.

The data also showed that those who spent more time planning next steps, whether creative follow-up or another relationship-building activity, were able to secure more than 120% more sales compared to their counterparts who did less planning.

Technology that tracks effective sales

activities and promotes next steps can help users decide where to focus their selling time.

It should also reveal opportunities to advance the sale beyond counting the number of tours given or calls made.

Another valuable insight provided by sales technology is that we should challenge the traditional notion that more enquiries will result in more sales.

We found that the most effective sales teams spent more time with fewer prospective residents. Using a CRM to qualify or disqualify as many leads as possible requires a constant flow of new enquiries. This strategy is ineffective and, in the end, requires more time and resources to achieve higher occupancies.

Investing in occupancy should not only mean generating new leads, it should also support a process and CRM that helps sales professionals be more effective in guiding the buyer to a purchase decision.

Looking beyond Covid-19, care settings should consider how and where to invest in securing future growth by increasing move-ins.

The conventional approach of prioritising lead generation and focusing on only selling services and facilities can deliver results, but this is not the most effective route to restoring a strong financial position.

The people who work in the care sector, including sales professionals, are the true assets of this industry. Empowering these individuals through technology to develop stronger relationships with prospective residents, ones built on trust and empathy, will support the sector to bounce back stronger than before and improve more lives.