



**ANGELS**  
senior living

## **Marketing Plan 2019 - 2020**

**Prepared by: Matt Sandler**



## UNIQUE SELLING PROPOSITION

Angels Senior Living provides assisted living and memory care communities throughout the greater Tampa Bay Area. We also provide a variety of rehabilitative, home care, and private duty services to individuals and residents alike. We offer best in class treatment in environments where “We’re small enough to know you, Large enough to serve you!” Our high-quality services offer residents and their loved ones peace of mind knowing that happiness, healthiness, and an enriching life are part of the Angels experience. We maintain a vested and personal interest in the success of our residents, building strong relationships just like your own friends and family.

## MISSION STATEMENT

Angels Senior Living provides high quality assisted living and memory care services to residents throughout the Tampa Bay Area. within Angels Senior Living communities and at local Tampa Bay Area outpatient, homecare, and Skilled Nursing Facilities (SNFs).

Angels Senior Living is your “all-in-one” solution to senior care. The Angels Network is special for its unique continuum of care. We offer everything from assisted living and memory care facilities to private duty nursing and long-term physical and speech therapy solutions for those in need. We're your “one-stop shop” for a variety of home healthcare and senior living options, customized to your special needs.

We provide residents in the Angels Senior Living network and at other facilities throughout the Tampa Bay Area with the LEGENDARY CARE and PERSONAL CONNECTIONS they need to successfully live, enjoy, and enrich their lives in comfort through a variety of avenues.

## INBOUND & OUTBOUND MARKETING OBJECTIVES

	<b>OBJECTIVE</b>	<b>MEASURABLE</b>	<b>AUDIT PROCESS</b>
<b>1</b>	Create and continually deliver marketing and brand strategy for the assisted living, pharmaceutical, rehabilitative, and other services Angels Senior Living offers	Growth in leads and sales over time	Ongoing
<b>2</b>	Improved inquiries and tours for Angels Senior Living - <b>increase number of monthly inquiries and resident placements</b>	Comparison to previous year’s sales/revenue report	Google Analytics, Data Studio, search engine analysis
<b>3</b>	Evaluate marketing costs and research more effective methods of spending by facility and in general	Comparison to previous year’s budget and	Quarterly evaluation



		sales/revenue report	
4	Improved awareness of the Angels Senior Living brand	Page visits, keyword analysis, search traffic, ad conversions, organic conversions, email campaigns, site tours	Monthly analysis of different outreach methodologies and their success rates – CRC evaluation
5	Stronger relationships with local healthcare facilities	Number of healthcare facilities successfully engaged by CRCs	Anecdotal and where possible statistical analysis of referral relationships
6	Improved quantity and quality of Angels Senior Living services including treatment/therapy information available on social media and website	More informative and periodic online content	Quarterly analysis to determine growth, effect on qualified leads
7	Developing resources highlighting Angels Senior Living ALF/Memory Care services in print	Availability and access to marketing collateral and mailers, including: <ul style="list-style-type: none"> <li>• Designing materials</li> <li>• Circulating mailers</li> <li>• Improving CRC standing in community</li> </ul>	Quality of collateral - eye test, analytical reporting, KPI analysis

### INTERNAL MARKETING OBJECTIVES

	OBJECTIVE	MEASURABLE	AUDIT PROCESS
1	Maintain budget and maximize marketing/sales team investment	Cost per lead and other KPI analysis in conjunction with CRC evaluation	Ongoing subject to yearly review
2	Become a national benchmark for successful, cost-conscious, patient-oriented assisted living, memory care, therapy, and pharmaceutical solutions across the healthcare spectrum	All of the above	Ongoing
3	Streamline marketing process to redirect CRC efforts more towards marketing and pursuing leads <ul style="list-style-type: none"> <li>• Reduce form redundancies/paperwork and move functions to ALIS as possible</li> <li>• Offload tours to EDs, AEDs, Wellness Managers (WMs)</li> </ul>	Positive feedback on changes in process - opinions surveys, paperwork reduction	CRC satisfaction, ongoing analysis of streamlined lead-to-sale process
4	Reduce costs to facilities	Year-over-year comparison of	Semi-annually, then monthly as data becomes



		marketing, merchandise, and other fixed/fluctuating costs	more easily available in ALIS
5	Improved quality of life for executive directors (EDs), CRCs, and other executive staff as well as all employees	Opinion surveys, quality analysis	Quarterly evaluation of FD/CRC satisfaction, analysis of Angels Senior Living retention and existing contract growth
6	Improved quality of life for residents and patients <ul style="list-style-type: none"> <li>• In assisted living</li> <li>• Skilled nursing facilities</li> <li>• At home</li> </ul>	Resident/patient satisfaction surveys, retention analysis	Quarterly evaluation of patient satisfaction, analysis of therapist retention throughout rehabilitation

**CURRENT SITUATION**

As Angels Senior Living scales up in number of facilities and employees, internalizing some or all aspects of inbound and strategic marketing becomes more necessary than ever. To maximize our marketing ROI, improving existing process and bolstering or introducing new strategies is necessary. We can leverage ALIS and other resources available to us to evaluate our successes and failures with data and reporting, creating a stronger, more standardized model for showcasing our assisted living facilities and other services, including pharmaceutical and therapy solutions. As the company grows, flexibility in targeting different demographics must be maintained.

There are great opportunities to implement smart, effective changes in the processes CRCs and other employees follow. These changes will help them focus on nurturing and successfully converting leads, reduce costs both in work hours and expenses, providing care to patients, and improving our analysis of both marketing impact and employee performance.

On the digital marketing side, many improvements stand to be made. More frequent advertising and analytics audits need to take place, emphasizing underlying keywords to continue to find new avenues for targeting. Improving content on the website, generating new content for the website, and setting certain pages up to directly compete on certain keywords is an absolute necessity.

**TARGET MARKET**

Our target market is [REDACTED FOR PRIVACY OF TARGETING].



The nature of our practice requires approaching our potential customers and their families with honesty, sensitivity, and respect, as well as emphasizing our flexibility in accommodation and offerings. Potential referral sources can be approached more generally, focusing on our accommodations and miscellaneous health care offerings such as a closed-door pharmacy, home health care, therapy/rehabilitation, and more.

## MARKETING KEY PERFORMANCE INDICATORS (KPIs)

- **Revenue**
  - How much money are we making?
  - Based off client lifetime value estimates. Actual value may vary.
  - *Currently [REDACTED] (based on [REDACTED] placements between October and March)*
- **Residents placed**
  - How many residents have we placed?
  - What other types of health care offerings are we engaging in and how can they be similarly measured?
  - *[REDACTED] residents placed between October and March*
- **Cost per placement**
  - How much are we investing into acquiring these contracts once contact has been made?
    - Man hours
    - Merchandising, if applicable
  - Currently no way to track
- **Tour ratio (Tours per month / Residents placed)**
  - How many tours do we give? How many tours convert to residents?
    - Dependent on marketing at each site
  - *47 tours (October to March)*
  - *17% tour ratio*
- **Cost per lead (Ad spend / Number of conversions)**
  - Cost per lead (only covers advertising; factor in manpower, overhead, etc. When more data becomes available)
  - *Currently \$233.41 (based on total Google ad spend since August 15)*
- **Website traffic**
  - *Currently [REDACTED FOR COMPETITION] (based on six-month period between October and March)*
- **Traffic-lead ratio (traffic / new leads)**
  - Analysis of website traffic, potential for growth in leads from online sources
  - *150 completed contact forms (October – March)*



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- *[REDACTED]* first time callers (October – March)
- *[REDACTED]* total contact goal completions
- Traffic-lead ratio is 6.54%
- **Value from inbound and affiliate marketing (total revenue from placements - total online/referral generated revenue)**
  - Breakdown by email campaigns, cold calls, site visits, affiliate sources, etc. to determine most effective methods and channels of lead development
- **Client lifetime value (average value per placement \* average length of placement)**
  - Factor in likelihood of retention after initial placement once data available
  - *est. \$50,000 (est. \$2,500 per month \* est. 20 months)*

## MARKETING KPI GOALS

**Revenue (R):** *[REDACTED]* in generated revenue (resident placement only)

**Residents placed (RP):** 13 residents

**Cost per placement (CPP):** TBD

**Tour ratio (TR):** 60 tours, 21% tour ratio

**Cost per lead (CPL):** \$233.41 (based on total ad spend since August 15)

**Website traffic (WT):** *[REDACTED]* (Projected for six-month period between May and October)

**Traffic-lead ratio (traffic / new leads) (TLR):** 1,300 total contact goal completions (180 completed contact forms and 1120 first time callers), traffic-lead ratio is 6.5%

**Value from inbound marketing (total sales - total online/referral generated sales) (VIM):**  
TBD

**Client lifetime value (average placement value \* average length of placement) (CLV):**  
*[REDACTED]*

### Additional Details:

- Cost of care ranges from *[REDACTED]* per resident per month
  - Depends primarily on property mortgage but also labor



- Estimated **marketing breakeven point (BE)**: 8 residents placed
  - Upcoming **digital marketing expenses (E)** between May and October are *[REDACTED]*.
  - At a fairly conservative estimate of value after placement *[REDACTED]*, factoring in reasonable monthly fixed **costs of care (C)** *[REDACTED]*, digital marketing profitability point is around 8 placed residents per six month period.
  - Estimated profit for average client (**P**) including *[REDACTED]* months of **C** is *[REDACTED]*
  - **BE = RP – E** where P = *[REDACTED]* and E = *[REDACTED]* is 8 residents
  - 13 residents placed yields *[REDACTED]* using CLV

## KPI REVIEW

Q	R	RP	CPP	TR	CPL	WT	TLR
Goals	<i>[REDACTED]</i>	13	TBD	21%	\$215.00	<i>[REDACTED]</i>	6.5%
1		5	TBD	29.48%	\$283.48	<i>[REDACTED]</i>	7.58%
2		3	TBD	21.02%	\$204.76	<i>[REDACTED]</i>	9.12%
3 (short)		4	TBD	12.52%	\$75.14	<i>[REDACTED]</i>	8.29%
2019	<i>[REDACTED]</i>	12	TBD	22.09%	\$133.22	<i>[REDACTED]</i>	8.35%

## ADVERTISING KEY PERFORMANCE INDICATORS (KPIs)

- **Return on ad spend (ROAS)**
  - How many leads are our ads generating?
  - What is our anticipated profit margin?
  - What can we do to improve our sales process?
- **Cost per conversion/lead/acquisition/action**
  - Similar to marketing KPI above, how much are actions costing us?
  - How can we improve?
- **Customer acquisition cost (CAC)**



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- What are our expenses for a move-in? For any other kind of acquisition?
- Factor in lifetime value (CLV) - CLV:CAC ratio should be around 3-4:1
  - CLV
- **Conversions**
  - Purely the number of first-time callers and contact form conversions
  - Charted over time to determine success
  - Breaks down traffic-lead ratio into one of its constituent components to play pure numbers
- **Quality/Relevance Score**
  - How many advertisers determine your ad's relevance related to the searcher
  - A higher quality or relevance score indicates lower prices for better placement
- **Average Rank**
  - Where do we place on the page? Above or below the fold (1-3, 4-6), second page?
  - How can we improve?
- **Sourcing**
  - Tracking sources across Facebook, Google, billboards, etc. will become even more important as we transition to a higher number of advertising channels

## **ADVERTISING KPI GOALS**

**Return on ad spend:** TBD

**Cost per conversion/lead/acquisition/action:** TBD

**Customer acquisition cost (CAC):** TBD

**Conversions:** TBD

**Quality/Relevant Score:** TBD

**Average Rank:** TBD

**Sourcing:** TBD

### **Additional Details:**

- Segmenting between organic and ad traffic is very difficult, particularly in our industry.
  - Barriers to perfect information include older adults, employees failing to source during tours or phone calls, a lack of information put into our CRMs, and more.



- Advertising KPI goals are TBD and will evolve and segment between platforms as we see responses come the end of the year.

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## Final Marketing & Advertising Review

Our marketing will improve by way of enhanced website offerings, bringing more information to consumers when they need it, and continually working to identify those needs. Providing our local market with the tools and information they need to make an informed decision above and beyond the offerings of our competitors is the most crucial component for success.

By the end of 2020, it shouldn't be too unreasonable to expect upwards of 75 contact form conversions per month, and around 175 first time callers each month. These numbers should be achievable given the growth rate of the industry and population of our target market. These will be primarily geared towards assisted living, but resources will continue to develop for other business segments, particularly private duty, as available.

More robust advertising, specifically for Google Display and Facebook, will launch 10/1/19. Over the course of the following two months every effort will be made to bring our CRM and reporting in line with these developments to drill down exactly where our leads are coming from. As our industry's potential market grows, they'll become more tech-savvy and demanding. Prospective leads may drop off simply because they weren't able to find absolutely everything they were looking for, when they were looking for it. In an effort to continue nurturing these leads in conjunction with communities, setting up a fully automated opt-in email marketing pipeline is in the works.

Institutional advertising and organic competitors like A Place for Mom, Caring.com, and seniorliving.com will become increasingly more difficult to claim top keywords against in the coming years as we lack a fundamental desire of the marketplace, the ability to compare other options. The primary methods of attack should take the form of geographically targeted advertising, campaigns for branding our services, delivering on organic, Tampa Bay Area-related content, and exploring how else we can deviate from the norm of what assisted living businesses typically offer both residents and their family members.

Additional difficulties are presented by changes to Medicare and the health care industry in general. Potential for SNFs, hospitals, and other sources of referrals to farm out ALF referrals to



agencies on the ground via contracts/agreements is extremely high given market saturation and is already happening in Sarasota.

Overall, my focus is to build a strong foundation for us to generate as many leads as possible, and to use proven tactics like drip campaigns to keep those leads as engaged as possible during their assisted living searches. This will be accompanied by supporting the existing sales process as best as possible to promote move-ins.

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## PRIORITY TARGETING NOTES

### 1. Lead Generation

#### a. Online Lead Generation (See 2-3)

- i. Website development
- ii. Google
  1. Improve NAP, My Business
- iii. Bing
- iv. See #3 for more information

#### b. Internal Lead Management (See 5)

- i. Database development
  1. Familiarize with existing clients and potential ones
  2. Sort by likelihood of contract via CRM/other method
- ii. Lead process optimization

### 2. Online Outreach

#### a. Content Planning & Creation

- i. “Content is king” and this is no different for us.
- ii. Quality and quantity of information
  1. Detailed breakdowns of solutions offered (PT, OT, ST, pharm, etc.)
  2. More pages on website? Consider power of organic traffic
  3. Opportunities for advertising online?
- iii. Blog posts or other rich information
  1. Spotighting case studies for collateral both online and offline
  2. Different services or emerging technology spotlights
  3. Exceptional employees, unique methods employed, etc.

#### b. Website Design & Development



- i. Improving navigation
- ii. Improving information - blog posts, other organic traffic signifiers
- iii. Integrating with social media if possible

### **3. Analytics & Advertising Expansion**

- a. Exploring new avenues of measuring engagement, contact form submission, and driving traffic to the website**
  - i. Hotjar, other analytical metrics to add to Google Tag Manager
- b. Google Search Console/Analytics**
  - i. Link Search Console to Analytics and mine for keyword database
- c. Competitor analysis research, tools, and/or database building**
  - i. Work in conjunction with Blue Lynx Marketing
- d. Advertising campaign optimization**
  - i. Explore Facebook, YouTube as options to reach target market
  - ii. Continuous monitoring of Google ad campaign and spending

### **4. Graphic Design & Collateral Management**

- a. Manage existing graphic design resources online and make readily available**
  - i. SharePoint/OneDrive
- b. Update and make improvements to existing resources and generate new resources as requested**
  - i. Continually evaluate new opportunities for meaningful marketing materials

### **5. Community Relations Coordinator Support**

- a. Process Optimization**
  - i. Streamlining paperwork and integrating marketing efforts into ALIS where possible
  - ii. Facilitating lunch-and-learns
    1. Identify and pursue membership in organizations exposing us to potential clients
    2. AHCA? FHCA? FHEA? Etc.
    3. Develop lists of individuals to invite for presentations/other materials
  - iii. Presentation development
    1. Develop wide range of collateral, including educational programs, targeted at specific prospects
  - iv. Networking events and nonprofit/organizational participation
    1. Participate in local networking events



## OBJECTIVE TIMELINE (APRIL 2019 - MARCH 2020)

### Legend

**Bold = important**

*Italics* = added later or moved from earlier due to time constraints/prioritization

**Highlighted** = completed

~~Strikethrough~~ = removed

### May

**Determine marketing expectations and where to focus efforts**

Develop preliminary budget template and begin filling out

**Familiarize self with Angels Senior Living business model, personnel and locational specialties, and general industry and trends**

Evaluate existing location-based collateral and map out content/design development for specific services/facilities if necessary (input from *[REDACTED]*)

Familiarize self with ASL existing lead generation and pipeline process

**Full marketing evaluation including Blue Lynx Marketing, additional services in Sarasota**

- *Custom theme orientation – Elementor, Toolkit*
- Analytics evaluation
- *AdWords/Facebook Ads refocusing - Pending meeting with Stefania*

Fix Google Analytics filters to better reflect actual traffic numbers

Online setup including SEO tools, Adobe Creative Cloud, Google Chrome, Analytics/Ads/SC/TM access

Determine Google My Business access problems and bring under one umbrella if possible

**Update all existing website content to maximize keyword/SEO coverage**

- **Home page**
- **Services**
- **Amenities**
- **Communities**

**Finalize first quarter (May – July) marketing plan detailing activities to achieve or exceed existing lead generation**

Initial orientation on ALIS

Identify or familiarize self with competitors and maintain resources on their growth, decay, investment strategies, etc.

Acquire access to mailing lists/software

**Plan knowledge base mapping and link buildout with Blue Lynx Marketing**



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Interview with Charles on pharmacy services to create brochure per marketing meeting conversation

Collect company online resources such as logos, banners, etc. for safekeeping and recyclability

**Site visits**

Pharmaceutical rack card

**June**

Deep dive into pharmaceutical side — costs and benefits over current model?

*Set up test website with server admin and Blue Lynx Marketing to pilot updates*

*Website updates - WordPress, plugins, PHP, printing option, font size option*

Therapy rack card

**Begin phase one of website buildout (increased objective's scope)**

- *Write content for and design Services hub page*
- *Write content for and design Adult Day Care landing page*
- *Write content for and design Our Company page*

**Conduct at least one interview with [REDACTED] on therapy solutions, private duty, home health, or pharmacy services respectively**

**Develop blog post based on interview for website**

*VITALS video – [REDACTED]*

Set up content tracker

Evaluate ALIS to determine potential for eliminating paperwork, particularly intake and placement form, following CRM

*Tour card – [REDACTED]*

**Outline all new website content with Blue Lynx Marketing using keyword analysis**

Familiarize self with potential and existing referral sources based on CRCs and other input

***Design comprehensive digital marketing lead funnel (sources --> landing pages --> engagement --> conversion)***

*Build and launch Connerton Court/Land O' Lakes Google Ad campaign with Stefania*

*[REDACTED]*

***Title and alt tags for all images on site***

*Redo core tenet card*

*Business card update*

*Build 404 page to redirect people, especially during URL remapping*

**Pitch website improvements with existing or new developer (see marketing analysis document for more information on recommendations) - anticipating minimal cost impact**

**Work with [REDACTED] to begin developing online resources for Angels Therapy Solutions**

- *Targeting staffing opportunities local to our facilities*
- *Seek out small ALF to pilot services*



## July

*Develop online branded floor plans to add to each facility's page - include square footage*

*Develop lists of amenities for each community (metadata friendly) - solely food focused page?*

- *Incorporate into templates*

*Fourth of July social media and GMB blast*

*Create and add HIPAA page to all menus*

*Create and add privacy policy page to all menus*

*Create terms of use page*

*Create social media policy page*

*Develop ALIS process for entering leads with Tracey (moved from June)*

*Continue phase one of website buildout (increased objective's scope)*

- *Write content for and design Amenities hub page*
- *Write content for and redesign Resources page (moved from June)*
- *Write content for and design Respite Care page*
- *Write content for and design Therapy Staffing page*
- *Write content for and design Pharmacy page*
- *Write content for and design Pharmacy ALF page*
- *Redesign location pages (Toolset & Elementor)*
  - *Incorporate templated spaces for standardization with Kevin*
    - *Amenities*
    - *Compact contact form*
    - *Floor plans*
    - *Levels of Care (with links to original levels of care)*
    - *Photo Gallery*
    - *Welcome video (TBD)*
    - *Activities Calendar (uploaded each month by activities directors)*
    - *Testimonial*
    - *Map*
    - *Related Communities*
    - *Community brochure area (add brochures to website)*

*Evaluate additional content opportunities with Blue Lynx Marketing*

*Email marketing research and development*

- *Use MailChimp or switch to something more customizable like Mautic?*
- *Drip campaign*

*Work with Blue Lynx Marketing to pilot best placement on website for maximizing email automation campaign – consider multiple funnel options, including gated content*

*Draft introductory email*



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*Draft and submit Dunedin/Palm Harbor postcard with [REDACTED] & [REDACTED]*  
*Close out Insurances Accepted doc with [REDACTED]*  
*Begin updating brochures with floor plan square footage (CRCs)*  
*Ad campaign request form created*  
*Add pharmaceutical services page to website (moved from June, waiting on [REDACTED])*  
*SeniorLiving TV preliminary meeting and expenses ([REDACTED])*  
*Home health presentation – University Village*  
*[REDACTED] insurance brochures*  
*Develop family satisfaction survey and discuss all other surveys [REDACTED] would like circulated*  
*Develop employee satisfaction survey*  
*Bing webmaster setup*  
*Set up email [REDACTED] for PR and sign-ups – [REDACTED]*

## August

### Q1 personal marketing review and analysis (May, June, July)

- € What did we accomplish?
- € Where can we improve?
- € What resources do we need to improve?
- € Quantitative analysis tying into KPIs

*Conduct at least one interview with [REDACTED] on speech therapy, private duty, or home health (moved from July)*

*Develop blog post based on interview for website (moved from July)*

- Meeting with [REDACTED] set for August 2<sup>nd</sup>

*Design advertisement for [REDACTED] program*

*Launch new location pages (broke out from design phase due to scope)*

*Location page template mobile design and user experience testing*

*Finish/QA online branded floor plans, amenities, sample menus, event listings as possible (moved from July)*

*Add facility executives and company leadership to website*

*New Port Richey postcard – [REDACTED]*

*Develop social media strategy for website – Tracey, [REDACTED], activities directors, etc. (just used real one [REDACTED] has in handbook)*

*Private duty mailer – [REDACTED]*

*Private duty/comprehensive mailer – [REDACTED]*

*New Port Richey party email newsletter*

*Lodges party email newsletter*

*Begin centralizing advertising campaigns and develop campaign repository for analysis*



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***Discuss private duty focus and how to funnel more business (8/7/19)***

*Transfer Google reviews into location testimonials*

***Implement private duty lead tracking (get access and discuss with [REDACTED])***

***Rebrand therapy staffing page to Angels Therapy Solutions***

*Evaluate opportunities for tour training*

## September

***Track and review Dunedin/Palm Harbor and New Port Richey postcards (moved from August)***

*Good to Great poster*

***Develop assisted living specific landing page for Google ads to increase conversion rate – work with Blue Lynx Marketing (moved from July)***

***Switched location-based ad campaigns to location pages – track for increased conversions***

***Write content for and design acquisition history timeline page***

***Develop home health survey to employees with [REDACTED]***

***Develop home health survey to residents with [REDACTED]***

***Redo contact form for business to business and business to client portals (moved from July)***

- ***Pharmacy***
- ***Therapy staffing***
- ***Volunteering***

*Research app requirements and ALIS integration*

*Research printing company requirements*

***Ad calendar submitted to [REDACTED] for approval and short-term ad campaigns launched***

***Expanded amenities page***

***Implement new service page design across all services and template in Toolset (holdover from phase one design buildout)***

*Dunedin one page slick*

***Design and implement Google Display Ads***

***Add advertising campaign-specific KPIs to track in marketing plan***

***Research and order color printer***

***Sarasota direct mailer***

***Transition ad campaigns to assisted living landing page***

## October

*Continue writing and publishing content*

***Research and roll out Facebook advertising (moved from September) (ongoing battle with Facebook to get our credit card approved)***



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***Restart Facebook retargeting (moved from September) (ongoing battle with Facebook to get our credit card approved)***

***Begin phase two of website buildout (increased objective's scope) (further increased objective's scope) (moved from July)***

- Moving identified existing resources/blog posts/questions to their own pages and lengthening copy on both existing service pages and question pages to target long tail keywords
- Nesting identified pages under resources/blog posts where appropriate
- New design and mapping for existing blog posts and resources
- QA all new pages and settings
- Categorize resources for conversion to streamlined assisted living knowledge base
- Create PDFs for all new resources

***QA search settings and incorporate site search into website***

***Cookie notice***

***Data entry of all old leads and initiation into pipeline***

***Revisit business card update and submit to [REDACTED]***

***Add testimonials to service pages and include other social proof on webpages (moved from September)***

***Redesign home page (updated pending first part of phase two)***

***Redesign leadership page***

***Redesign careers page***

***Redesign culinary excellence and social life pages***

***Redesign photo and video gallery pages***

***Redesign testimonial page***

***Redesign all additional archive pages***

***Ensure all successful redirects***

***Sarasota party email and Facebook campaign***

***Color printer setup***

***Pharmacy sheet***

**November**

***Q2 personal marketing review and analysis (August, September, October)***

- € What did we accomplish?
- € Where can we improve?
- € What resources do we need to improve?
- € Quantitative analysis tying into KPIs

***Continue writing and publishing content***

***Design and write professional referrals page / series of pages for website (moved from August)***



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**Finalize deprecation of unused website plugins, perform full site and pipeline audit in preparation for lead maximization in 2020**

**Redo headers and footers (moved from September pending resource redesign)**

**Research, remediate, and implement community comparison features (moved from October) –**

**Search by/archive pages for:**

- **Levels of Care (e.g. all communities that offer AL/MC etc.)**
- **Locations (e.g. all communities in Tampa)**

**Announcement banner for website**

**Therapy research for CEUs – keywords, web resources, advertising**

**Millie's placemat ad for Sarasota (moved from October)**

**Parkinson's flyer for [REDACTED]**

**Template service pages**

**Draft content (~10 or so emails to begin)**

- **Automate contact forms to email lists**
- **Template design for e-books/brochures/flyers to use with emails**

**Add Tracey's FAQs to appropriate pages (moved from October)**

**Yoast Local SEO or equivalent**

**Insurances Accepted Updates**

**Site speed audit**

**Home health agency questionnaire as evergreen content**

**Custom excerpts (Blue Lynx Marketing)**

**Update and order new postcards**

**Add featured images to all pages**

**Template contact forms where possible**

**Thanksgiving emails**

**Thanksgiving GMB + FB posts**

**Implement B2B/B2C menu "divide"**

**December (some items below have been rolled into 2020 marketing plan)**

**Evaluate A/B testing opportunities with Google Optimize and the assistance of Blue Lynx Marketing (moved from July)**

**Explore potential for developing infographics (moved from September)**

**Strategy meeting with Kevin – Blue Lynx Marketing**

**Explore options for "What kind of assisted living resident are you?" interactive tool (moved from July)**

- **Memory care**
- **Roll in budgeting tool if possible?**

**Cost comparison sheet – assisted living, memory care, etc. (moved from October)**



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*Consider social media transition to booking tool, build out automated responses*

## **End of Year Analysis**

- **Write 2020 marketing plan and update goals/KPIs to reflect this year's improvements**
  - **Include simpler KPIs like raw tours, inquiries, etc.**
- **Perform analytical deep dive to determine focuses for future growth and development**
- **Deliver full review statement 1/2020**

*Christmas emails + GMB posts + Facebook posts*

*Develop e-book to integrate into email marketing campaigns and use as gated content (moved to 2020, cancel all gated content efforts)*

*Add microdata to FAQs (JSON-LD) (increased scope, moved from September) (Blue Lynx Marketing) (moved to 2020)*

*Address low location speed pages*

## **Tour booking tool**

- **Research (roll into CEUs)**
- **Facebook integration**
- **Also available on website**
- **Identify stakeholders and determine how best to share information with communities**

*Header specific to referral and CEU pages*

**Final SEO Audit – emphasize assisted living and memory care**

**Security review and research**

## **To be considered as available / for different functions:**

Develop templates for cold emailing/cold calling based on specific services/facilities

Home health training

*Apple Maps verification (tabled until policy changes or experiment ends)*

*Develop backend for activities submission (tabled until time available)*

*Explore SendGrid text message marketing opportunities (tabled until time available)*

Evaluate Illustratus role and determine if it can be replaced

**Acquire Facebook Certified Buyer/Planner certifications - paid, requires relevant courses**

*Welcome video/food video setup – [REDACTED] (tabled until update provided)*

**TBBJ press release announcing promotions (tabled)**

**Design and finalize New Tampa billboards (tabled)**

*Revisit private duty advertising with [REDACTED]*

**Push for ALIS integration allowing for synchronized management of email lists with MailerLite/other software**

**Begin designing calculator for assisted living and incorporate existing locations – budgeting tool? Rate sheets? (moved from October)**



*Pricing guided tour – location, bed, budget, care preferences (moved from October) (pricing can't be online – generalized pricing?)*

*Business card*

*Private duty landing page, ad, tracking campaign with [REDACTED] (moved from August)*

## 2019 MARKETING REPORT

### INBOUND & OUTBOUND MARKETING OBJECTIVES

	<b>OBJECTIVE</b>	<b>MEASURABLE</b>	<b>AUDIT PROCESS</b>	<b>EOY REVIEW &amp; ANALYSIS</b>
<b>1</b>	Create and continually deliver marketing and brand strategy for the assisted living, pharmaceutical, rehabilitative, and other services Angels Senior Living offers	Growth in leads and sales over time	Ongoing	Significant strides in brand management and strategy for assisted living, therapy, and overall business cohesion.
<b>2</b>	Improved inquiries and tours for Angels Senior Living - <b>increase number of monthly inquiries and resident placements</b>	Comparison to previous year's sales/revenue report	Google Analytics, Data Studio, search engine analysis	Dramatic and sustained growth in lead generation. Tours up, move ins up, but more improvements can be made.
<b>3</b>	Evaluate marketing costs and research more effective methods of spending by facility and in general	Comparison to previous year's budget and sales/revenue report	Quarterly evaluation	Significant cost reduction due to <b>[REDACTED]</b> . Associated marketing spend has not unduly grown. Expect more spend once a high level of funnel sophistication is realized (soon).
<b>4</b>	Improved awareness of the Angels Senior Living brand	Page visits, keyword analysis, search traffic, ad conversions, organic conversions, email campaigns, site tours	Monthly analysis of different outreach methodologies and their success rates – CRC evaluation	Slight organic traffic growth – focus for 2019 was building up to a foundational point.
<b>5</b>	Stronger relationships with local healthcare facilities	Number of healthcare facilities	Anecdotal and where possible	N/A



		successfully engaged by CRCs	statistical analysis of referral relationships	
6	Improved quantity and quality of Angels Senior Living services including pharmacy/private duty/home health/treatment/therapy information available on social media and website	More informative and periodic online content	Quarterly analysis to determine growth, effect on qualified leads	Website is approaching functional completion and focus can shift to content and other resources in 2020.
7	Developing resources highlighting Angels Senior Living ALF/Memory Care services in print	Availability and access to marketing collateral and mailers, including: <ul style="list-style-type: none"> <li>• Designing materials</li> <li>• Circulating mailers</li> <li>• Improving CRC standing in community</li> </ul>	Quality of collateral - eye test, analytical reporting, KPI analysis	Great deal of new and updated collateral for 2019 – focus for 2020 collateral on developing e-books, infographics, and other actionable content. Shift focus to holistic treatment for company.

## INTERNAL MARKETING OBJECTIVES

	OBJECTIVE	MEASURABLE	AUDIT PROCESS	EOY REVIEW & ANALYSIS
1	Maintain budget and maximize marketing/sales team investment	Cost per lead and other KPI analysis in conjunction with CRC evaluation	Ongoing subject to yearly review	2019 budget outlined but not judiciously tracked. 2020 budget will be a superior product as we shift to more comprehensive campaigns.
2	Become a national benchmark for successful, cost-conscious, patient-oriented assisted living, memory care, therapy, and pharmaceutical solutions across the healthcare spectrum	All the above	Ongoing	Better oriented web presence towards providing answers and supporting families
3	Streamline marketing process to redirect CRC efforts more towards marketing and pursuing leads <ul style="list-style-type: none"> <li>• Reduce form redundancies/paperwork and</li> </ul>	Positive feedback on changes in process - opinions surveys, paperwork reduction	Ongoing analysis of streamlined lead-to-sale process	Continued efforts towards paperwork reduction, including for classes, tours, etc. Work with ALIS API to further



	<p>move functions to ALIS as possible</p> <ul style="list-style-type: none"> <li>Offload tours to EDs, AEDs, Wellness Managers (WMs)</li> </ul>			integrate the customer journey.
4	Reduce costs to facilities	Year-over-year comparison of marketing, merchandise, and other fixed/fluctuating costs	Semi-annually, then monthly as data becomes more easily available in ALIS	<i>[REDACTED]</i>
5	Improved quality of life for executive directors (EDs), CRCs, and other executive staff as well as all employees	Opinion surveys, qualitative analysis	Quarterly evaluation of ED/CRC satisfaction, analysis of Angels Senior Living retention and existing contract growth	Surveys have not been approved/sent. Consider other efforts to improve QOL for all employees.
6	Improved quality of life for residents and patients <ul style="list-style-type: none"> <li>In assisted living</li> <li>Skilled nursing facilities</li> <li>At home</li> </ul>	Resident/patient satisfaction surveys, retention analysis	Quarterly evaluation of patient satisfaction, analysis of therapist retention throughout rehabilitation	Surveys not sent out – persistent access to resident/family emails and necessary purchases not made.

## Q2 MARKETING REPORT

### INBOUND & OUTBOUND MARKETING OBJECTIVES

	OBJECTIVE	MEASURABLE	AUDIT PROCESS	Q2 REVIEW & ANALYSIS
1	Create and continually deliver marketing and brand strategy for the assisted living, pharmaceutical, rehabilitative, and other services Angels Senior Living offers	Growth in leads and sales over time	Ongoing	Strong grasp on market with actionable data gathering but little translation to sales
2	Improved inquiries and tours for Angels Senior Living - <b>increase number of monthly inquiries and resident placements</b>	Comparison to previous year's sales/revenue report	Google Analytics, Data Studio, search engine analysis	Dramatic growth in contact form submissions and monthly inquiries (nearly 200% in Q2)



3	Evaluate marketing costs and research more effective methods of spending by facility and in general	Comparison to previous year's budget and sales/revenue report	Quarterly evaluation	Cost reduction very successful, and operation is approaching a medium-high level of sophistication
4	Improved awareness of the Angels Senior Living brand	Page visits, keyword analysis, search traffic, ad conversions, organic conversions, email campaigns, site tours	Monthly analysis of different outreach methodologies and their success rates – CRC evaluation	Minimal/no organic traffic growth – focus has been building a very strong foundation
5	Stronger relationships with local healthcare facilities	Number of healthcare facilities successfully engaged by CRCs	Anecdotal and where possible statistical analysis of referral relationships	N/A
6	Improved quantity and quality of Angels Senior Living services including pharmacy/private duty/home health/treatment/therapy information available on social media and website	More informative and periodic online content	Quarterly analysis to determine growth, effect on qualified leads	These resources are available and have been built out since Q1 but time constraints prevent growing their impact.
7	Developing resources highlighting Angels Senior Living ALF/Memory Care services in print	Availability and access to marketing collateral and mailers, including: <ul style="list-style-type: none"> <li>• Designing materials</li> <li>• Circulating mailers</li> <li>• Improving CRC standing in community</li> </ul>	Quality of collateral - eye test, analytical reporting, KPI analysis	Strong collateral growth – floor plans, menus, activities available online, additional resources developed for ACHH

## INTERNAL MARKETING OBJECTIVES

	OBJECTIVE	MEASURABLE	AUDIT PROCESS	Q2 REVIEW & ANALYSIS
1	Maintain budget and maximize marketing/sales team investment	Cost per lead and other KPI analysis in conjunction with CRC evaluation	Ongoing subject to yearly review	Budget fully outlined but not acted on, data is strong



2	Become a national benchmark for successful, cost-conscious, patient-oriented assisted living, memory care, therapy, and pharmaceutical solutions across the healthcare spectrum	All of the above	Ongoing	Better oriented web presence towards providing answers and supporting families
3	Streamline marketing process to redirect CRC efforts more towards marketing and pursuing leads <ul style="list-style-type: none"> <li>Reduce form redundancies/paperwork and move functions to ALIS as possible</li> <li>Offload tours to EDs, AEDs, Wellness Managers (WMs)</li> </ul>	Positive feedback on changes in process - opinions surveys, paperwork reduction	Ongoing analysis of streamlined lead-to-sale process	Lead process hammered out. At horizon for paperwork reduction unless structural changes are made.
4	Reduce costs to facilities	Year-over-year comparison of marketing, merchandise, and other fixed/fluctuating costs	Semi-annually, then monthly as data becomes more easily available in ALIS	<i>[REDACTED]</i>
5	Improved quality of life for executive directors (EDs), CRCs, and other executive staff as well as all employees	Opinion surveys, qualitative analysis	Quarterly evaluation of ED/CRC satisfaction, analysis of Angels Senior Living retention and existing contract growth	Surveys have not been approved/sent.
6	Improved quality of life for residents and patients <ul style="list-style-type: none"> <li>In assisted living</li> <li>Skilled nursing facilities</li> <li>At home</li> </ul>	Resident/patient satisfaction surveys, retention analysis	Quarterly evaluation of patient satisfaction, analysis of therapist retention throughout rehabilitation	Surveys not sent out – access to resident/family emails and necessary purchases not made.

## Q1 MARKETING REPORT

### INBOUND & OUTBOUND MARKETING OBJECTIVES

	OBJECTIVE	MEASURABLE	AUDIT PROCESS	Q1 REVIEW & ANALYSIS
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1	Create and continually deliver marketing and brand strategy for the assisted living, pharmaceutical, rehabilitative, and other services Angels Senior Living offers	Growth in leads and sales over time	Ongoing	Think we have a better grasp on most of these things, but has largely not yet translated to sales
2	Improved inquiries and tours for Angels Senior Living - <b>increase number of monthly inquiries and resident placements</b>	Comparison to previous year's sales/revenue report	Google Analytics, Data Studio, search engine analysis	Anecdotal – NPR, NEWT improved, but other changes make measuring tough currently
3	Evaluate marketing costs and research more effective methods of spending by facility and in general	Comparison to previous year's budget and sales/revenue report	Quarterly evaluation	Steps taken to corporatize marketing and keep ad success records
4	Improved awareness of the Angels Senior Living brand	Page visits, keyword analysis, search traffic, ad conversions, organic conversions, email campaigns, site tours	Monthly analysis of different outreach methodologies and their success rates – CRC evaluation	Maybe slightly, but not much improvement – transitioning with CRCs/EDs as well
5	Stronger relationships with local healthcare facilities	Number of healthcare facilities successfully engaged by CRCs	Anecdotal and where possible statistical analysis of referral relationships	N/A
6	Improved quantity and quality of Angels Senior Living services including treatment/therapy information available on social media and website	More informative and periodic online content	Quarterly analysis to determine growth, effect on qualified leads	These resources are now written and available, but time constraints prevented developing their impact.
7	Developing resources highlighting Angels Senior Living ALF/Memory Care services in print	Availability and access to marketing collateral and mailers, including: <ul style="list-style-type: none"> <li>• Designing materials</li> <li>• Circulating mailers</li> <li>• Improving CRC standing in community</li> </ul>	Quality of collateral - eye test, analytical reporting, KPI analysis	More and better collateral available – floor plans set to go online, menus and activities made more prominent, preparing for submission by community, ACHH, TLTCP, ATS

## INTERNAL MARKETING OBJECTIVES



# ANGELS

senior living

	OBJECTIVE	MEASURABLE	AUDIT PROCESS	Q1 REVIEW & ANALYSIS
1	Maintain budget and maximize marketing/sales team investment	Cost per lead and other KPI analysis in conjunction with CRC evaluation	Ongoing subject to yearly review	Budget outlined but data missing
2	Become a national benchmark for successful, cost-conscious, patient-oriented assisted living, memory care, therapy, and pharmaceutical solutions across the healthcare spectrum	All of the above	Ongoing	
3	Streamline marketing process to redirect CRC efforts more towards marketing and pursuing leads <ul style="list-style-type: none"> <li>• Reduce form redundancies/paperwork and move functions to ALIS as possible</li> <li>• Offload tours to EDs, AEDs, Wellness Managers (WMs)</li> </ul>	Positive feedback on changes in process - opinions surveys, paperwork reduction	CRC satisfaction, ongoing analysis of streamlined lead-to-sale process	Tours being offloaded to EDs/WCs/etc in some communities. Approaching horizon for paperwork reduction following ALIS buy-in.
4	Reduce costs to facilities	Year-over-year comparison of marketing, merchandise, and other fixed/fluctuating costs	Semi-annually, then monthly as data becomes more easily available in ALIS	Difficult to say, would have to compare notes.
5	Improved quality of life for executive directors (EDs), CRCs, and other executive staff as well as all employees	Opinion surveys, quality analysis	Quarterly evaluation of ED/CRC satisfaction, analysis of Angels Senior Living retention and existing contract growth	<b>[REDACTED]</b> . Surveys set soon.
6	Improved quality of life for residents and patients <ul style="list-style-type: none"> <li>• In assisted living</li> <li>• Skilled nursing facilities</li> <li>• At home</li> </ul>	Resident/patient satisfaction surveys, retention analysis	Quarterly evaluation of patient satisfaction, analysis of therapist retention throughout rehabilitation	Surveys set to go out soon.