



CLIENT SPOTLIGHT

Sunrise Senior Living

Engaging New Residents and Their Families

Sunrise Senior Living is a resident-centered senior living provider that operates hundreds of communities throughout the United States, Canada, and the United Kingdom. Established in 1981, they pride themselves on delivering personalized service offerings and customer service, but always with an awareness that there is room for improvement – a popular company belief is that “the best senior living has yet to be invented.”

The level of detail and attention they give their clients is integral to their success. The healthcare needs of Sunrise’s clientele vary widely, from individuals capable of living independently, to those suffering from Alzheimer’s disease

and other forms of memory loss, to those requiring skilled nursing. Sunrise Senior Living’s variety of service offerings and other industry-specific factors would pose a challenge to any customer experience measurement (CEM) provider.

Address Customer Expectations during the Sales Process

The corporation’s diverse services support high retention and engagement, but acquisition has always been the most critical aspect of customer journeys within the assisted-living vertical. It is a common misconception that all older adults are covered through Medicare. According to *The Journal of General Internal Medicine* [SG1], this demographic spent \$38,688 for medical care in the last five years of life. The top

+ IMPACT

Actionable, consistent, and quality data manages prospective clients’ expectations; improves acquisition rates

+ IMPACT

CEM tool analyzes current market trends and offers competitive insights and suggestions for overall sales and brand initiatives

+ IMPACT

Data-driven sales training enables Sunrise Senior Living to develop deep understanding of their target customer before they walk in the door

25% of spenders paid \$101,791. Long-term care expenses that are not covered by Medicare, such as many services in assisted living communities, are the #1 cost driver. These expenses can be unexpected for many families and strip one-quarter of older adults of their remaining assets.

The decision to move into an assisted living community is compounded by concerns regarding the quality of ongoing care. Many of the concerns potential customers have cannot be asked explicitly. In order to properly address both stated and unstated concerns, sales representatives must be well-versed and updated on customer expectations, as well as their competition, and must skillfully develop a trusting relationship with a prospective customer in a short period of time.

By analyzing the sales process, CEM offers a deep understanding of the customer's first experience of their brand. However, efficacy of CEM is often determined by how deeply analytics can delve into customer interactions. In an industry like assisted living, customer segmentation is extremely complex, involving not only demographics but also medical conditions and family situations that bring customers to Sunrise. The multiplicity of factors is difficult to understand, much less analyze with precision and consistency.

It was not a surprise when Cory Benson, Sunrise's Vice President of Sales Training and Development, told us the company had struggled with the quality of their data in past attempts to capture this initial customer experience. They were willing to upgrade their investment and see if we could advise them as they addressed their recurring issues with actionable, consistent, quality data.

Equipping the Sales Teams with a Data-Driven Training Program

Sunrise's sales team required a consistent, comprehensive analysis of their sales process. The analyses needed to be conducted comparing specific communities to competitors in the market. Analyses also needed to be conducted internally on the cohesiveness of the brand at a corporate level. Sunrise engaged us to perform an extensive mystery-shopping program of the sales process in more than 200 communities, providing those communities with the opportunity to conduct "on-demand" mystery shops of in-market competitors as well. We also provided the centralized Sunrise national sales team with metrics to compare their performance against others in their class.

The project was challenging – not due to its substantial analytical requirements, but because our shoppers had to walk in with viable and credible scenarios. If the sales team were to suspect mystery shoppers with any regularity, our data pool would become unreliable. This constraint led us to constantly replenish the shopper pool. We adjusted our recruitment process accordingly and went to work.

To advise the Sunrise Senior Living sales team on how they could engage with customers effectively across communities and services, we recommended an actionable tool. Using the consistent flow of data from our mystery-shopping program, the tool analyzes current feedback and provides insights on the customer experience of the sales process, where it provides material for coaching and development at the community level and recommendations on overall sales and brand initiatives on a corporate level.

Outcome

Our experienced team has advised the Sunrise CEM program for over four years and, despite the challenges and complexities, has delivered consistent data with minimal defects. We provided advice on their CEM problem and provided their sales teams with actionable customer insight. They know what to expect before the customer walks in the door.

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