

Intro

Welcome to season eight of Bridge the Gap, a podcast dedicated to informing, educating, and influencing the future of housing and services for seniors. The BTG network is powered by sponsors, Aline, NIC MAP, Procare HR, Sage, Hamilton CapTel, ServiceMaster, The Bridge Group Construction, and Solinty and produced by Solinity Marketing. Bridge the Gap in three, two.

00:51 - 01:07

Lucas McCurdy

Welcome to Bridge the Gap podcast is senior Living podcast with Josh and Lucas. Beautiful Fort Lauderdale FSLA Conference here in the summer, summer, summertime. We got a great guest, one of our big supporters, Evan, with Aline and Roobrik. Welcome to welcome back to the show.

01:07 - 01:10

Evan Friedkin

Yeah, thanks for having me think this is what number here? Number three.

01:10 - 01:10

Lucas McCurdy

Three, four at Least

01:10 - 01:11

Evan Friedkin

Something like that.

01:12 - 01:13

Lucas McCurdy

You're a frequent flier.

01:13 - 01:17

Evan Friedkin

Yeah, I like to show up every now and then.

01:17 - 01:41

Lucas McCurdy

Well, so the last time you were on, it was the big announcement of Aline and Roobrik merging together. And, for people that know Roobrik, you guys are masters at bridging the gap in the sales process. And what does that look like today? You know, months later, how has Roobrik and Aline aligned, so to speak?

01:41 - 03:12

Evan Friedkin

For those of you who are unaware of the Roobrik product, it's really a tool that's designed to help consumers who are going through one of the hardest decisions they've ever had to make in

their entire life, which is the decision to move to senior living. Really take the time digitally to self-assess, better understand what it is that they value, where they're headed, what barriers they might face along the way, and educate them before they ever even talk to a salesperson.

So when a line approached us and we made the announcement back in January, where Roobrik is going to come under the Aline fold, the opportunities were just endless. Where Aline has built their business around, how do you empower the sales teams to be able to have better conversations through the CRM, through their chats, through the contact center, and have more, better conversations?

And so being able to get more data on the front end of that pipes into the CRM was just a no-brainer. And so now, where we're headed is that we get all this data from consumers that are anonymously browsing on these websites. We can push that into the CRM and do dynamic updates to the contact records. So sales teams are going into these conversations blind.

The biggest opportunity is that staffing is obviously an issue. Sales teams are asked to do a lot of things daily, and so the last thing that they need to do is have to dig through these CRM, which are usually static and updated maybe daily with some additional information. And now they're getting dynamic summaries that they can go directly into that call, pick up the phone, and it'll sound like they've known that prospect for months because they have the information.

03:12 - 03:35

Josh Crisp

Wow. So now you're making that sound like that is super easy. That's a very complex system. But is it because of the alignment? No pun intended, of all these different companies and specialties, and software are all under one umbrella. Now, is it what makes this feel seamless, or is it just the Roobrik tool, or how does that actually work?

03:35 - 04:35

Evan Friedkin

It's a combination of a lot of different things. And operators can do this dynamically with the systems that they use, or they can do it all under one roof. And so the goal I'm glad it sounds easy, because at the end of the day, when you launch a technology, you want it to look and feel seamless, something that you can dive into and begin using almost immediately.

With a little ramp-up up that ramp-up is something you train on. It's something that you have to get the sales team comfortable with so that they're not dropping calls or missing data. And so, yeah, with having the Roobrik software flowing into the line CRM, you can look in a few different ways. So if you're using another CRM, you're still going to get the river data.

And that just pumps in, and it's static. It's living in the contact record. However, with the online CRM, we're taking all of the data points and feeding it through an algorithm that can now create smart summaries that will tell you the most recent activities and what that means, and how you

can use that to have those better conversations. And so I wish I could say it's easy on the back end, but for the sales teams that are using it, it looks and feels amazing.

04:35 - 04:43

Josh Crisp

So say that again. It's an automated summary. So, essentially, is that through AI? How's that working?

04:43 - 05:13

Evan Friedkin

Within the contact record, there are all kinds of data points that are flowing into these records. And so we ask sales teams, like, "Hey, it can be as granular as what page on the website did this consumer convert on?" Sales teams are not going to do that. But if it flows through a system, it and the system can provide context to the software information like that, or the granular information that marketing teams historically have cared about, now all of a sudden, sales teams can get an insight into where is that buyer's headspace and be able to connect with them so much quicker than they otherwise would.

05:13 - 05:41

Josh Crisp

Practically speaking, is it as easy as, "Hey, I'm a community professional, I walk into my office or walking in the building, or maybe I'm at home a virtual day and I want to check in on, you know, what's the latest going on with my dashboard of of contacts that I'm working with?" Maybe it's the decision maker's sons or daughters. Maybe it's the residents themselves in some setting. And you're saying there's a dashboard that's going to sort of inform me on what's the latest. At a glance.

05:41 - 06:37

Evan Friedkin

It could be as simple as sales teams have a lot of leads. I was just having some conversations with some operators, and they said, well, we turn in, we open that up, that CRM. There are thousands of leads, all at different stages. So Aline has had the opportunity to score on the contact records that take the recent activities from the prospect and provide a score that lets you know, hey, what's the likelihood that this person is likely to move now?

What we're working towards and about to launch soon is a top ten list. So based on all the activities that are happening within that contact record, who are the top ten people that this salesperson should be focused on today and then eventually get to an opportunity to be able to suggest next steps that the prospect or that the salesperson can say, yeah, this looks great, I'll take it and I'll update it or not regenerate or decline it, I'll do my own thing. And so we're trying to take away and prompt, and lead the salesperson to be able to do what they do best, which is connect with the consumer and have more conversations.

06:37 - 07:38

Josh Crisp

As a user of Roobrik, I mean, one of the things, before the merger that, you know, we were sold on and we saw is that, it's almost sort of a lead nurture, to where folks that maybe were visiting our website or poking around and even maybe they didn't believe they were ready for our care, or the adult son or daughter didn't believe that they were quite ready for memory care or whatever it was, assisted living, through some of those tools.

Right. That you all can equip marketing teams or community leaders, or sales teams with. This sort of takes this educational, informational journey of whoever's making that decision, without the sales team actually having to even have a conversation, and then a lead that's very educated. And then now is like, oh, I actually am ready. Based on this information that I didn't know, how has that journey changed or improved since you joined with Aline, and now it's all under one umbrella?

07:38 - 09:09

Evan Friedkin

I think what's great about it is one of the things that we always wanted to know prior to a tight time with a CRM was what happens to these people. We know we can get them over the hump and get them to have the conversation. We can speculate that sales teams are having better conversations. We know that they are converting at a higher rate on the website, but what we weren't sure about was how that translates to actionable conversations.

And so when we look within the CRM, when we when we see our operators that are leaning into this idea of the education, the self, the self-education, without a salesperson being involved, allowing the consumer to better understand not only where they are, where do they want to go, what barriers are they likely to experience at some point in this process and allow them to confront that in the comfort of their own home without feeling judged?

It actually removes those roadblocks that the salesperson has to navigate around or overcome. And so we watched the sales cycle speed up, and we got to see that in the data. We watched conversion rates to move-ins, tighten up. We watched the disqualification rates become more predictable, where we're still going to send people over.

They're not qualified. And that's fine. We were still a resource for them, but we can flag it for the sales teams. So they didn't know how to dig in. Hey, this person likely might not be the best fit for your communities for these three reasons. Asking these questions, and you get them. And now they're not spending an hour on a tour. And then they find out that they're not the right fit because they actually need a higher level of care.

09:09 - 10:23

Josh Crisp

Well, you know, Lucas, as I'm sitting here thinking about this, you know, one of the reasons why we started the podcast and sort of one of those North Stars is like, gosh, we want to make everybody better in senior housing. And in doing that, make senior housing better, which

also if we do that, it changes the outside perception and perspective of people that need our services, because we we all know based on the data, there's a lot of people out there that need to be in our communities that maybe don't know us, don't know what we really do.

It's confusing. So it's kind of there are a lot of barriers for people that are confusing, right? Just an educational thing. So it sounds like to me, if these tools are equipping, empowering, and enabling sales professionals to do a better job at that, ultimately, this is something that's helping to change the perception of an industry that's been sort of a mystery.

But as we know, with the aging population, we have the greatest capacity to make a huge impact on the lives of aging adults around the world. So it's pretty exciting that we've got partners that are helping us do that.

10:23 - 10:50

Lucas McCurdy

Totally. I mean, this type of technology and insight into, to your point of, in a very difficult decision, is paramount. I think anytime you can better connect with your potential buyer, your consumer, it makes a big difference. It makes for an even better transition. Even if they weren't going to buy anyway. I mean, why not know them better? And suit their needs, right?

10:50 - 11:10

Evan Friedkin

I think that's exactly right. I think the macro vision for Aline is how do we seamlessly pass information that's gathered via not only our consumers, but our residents, from our vendors? How do we take all of the information that is in the ecosystem around a resident or a consumer, and seamlessly pass that information to the other people that are involved in this decision?

Because at the end of the day, you're streamlining that process. You're making it more enjoyable for a very unenjoyable decision. You are making it just easier for the family. And the way we're saying it internally is we're trying to elevate it. We're trying to make not only the lives of the residents and prospects, but also the lives of the caregivers.

People in the communities have an easier job to be able to connect with the people they serve every day and spend more time with them as opposed to within the systems. And so we want to be able to take these systems and let them have access to the data that flows through these communities daily. Yeah, see it through one single pane of glass and know exactly what's happening within these operations so that they can become more efficient, which ultimately transfers down to a better experience resident in the families that are tied to

11:57 - 12:04

Josh Crisp

Very complex, but you make that sound again, very simple. I've always been impressed with you. How long have you been doing this? By the way.

12:04 - 12:05

Evan Friedkin

When you say "This," what do you mean?

00;12;05;35 - 00;12;07;26

Josh Crisp

Like there's with Roobrik. When did you guys start? When did you enter the senior housing industry specifically?

12:11 - 12:20

Evan Friedkin

So I joined Rubrik as employee number six. April of 2019. So as soon as I got to learn the industry, I had to relearn the industry because we reset in 2020.

12:20 - 13:18

Josh Crisp

Yeah, well, you know, I want to compliment you. You've done a phenomenal job of really earning the respect. You've had a ton of success in a relatively short amount of time during a very difficult time. And I love your approach. You know, from the first time I met you, heck, I didn't even have a clue who you represented or what you did, but you have a knack for learning a relationship and earning a relationship with people before they really even know what you do.

And I think it's shown. So for a minute, for all those folks in our industry who are pros at whatever they do, a product or service that they are part of. Do you have any bits of information that you can share of tips on how you've navigated coming into a new vertical over the last few years, and what it's been like for you, and tools of the trade that you would pass along to pros.

13:18 - 13:35

Evan Friedkin

Thank you very. To distill it down to three, I would say number one is show up, be there, just be around you. There's a lot there's a lot of people in the industry, and you get to know them. Do not lead with product would be number two. Don't leave with products. You've got to take a step back and listen to what they're actually saying.

Because then you come in with products that you're just going to be, that you're gonna be, you're a solution vendor, and they're not gonna want to talk to you. And it's going to be very difficult to crack into this industry, because at the end of the day, this industry is built on relationships. And so we have to show up.

We have to be curious, and we want to learn from the people that we're talking to. I try to make it a point for every interaction I have at any of these conferences to walk away learning at least three new things that I did not know about in different areas of the industry or of the business that I've never thought about. And I don't always do it. I'm not always great at it, but at the same time, if you become intentional around it, you can do that.

14:12 - 14:34

Josh Crisp

Thanks for sharing some of those tips. I know our listeners are many of them are just determining whether they're going to take the opportunity to join this industry and figuring out how to navigate it. But it's a tight-knit group. And a family, so to speak. And it's great to have folks like you, partners like Aline and Roobrik, through the years, we're pretty lucky.

14:34 - 14:47

Lucas McCurdy

We are. We are. And this is how we're able to bring this content to you freely. It's through the support of our partners and sponsors. Adeline, great conversation. Thank you so much for your time today.

14:47 - 14:48

Evan Friedkin

Yeah, it's always a blast.

14:48 - 15:03

Lucas McCurdy

And for those of you who want to learn about Align and Roobrik, you can scroll down to your show notes. Hit those links right there, go to btgvoice.com, download this content, and so much more. We'd love to see you on LinkedIn as well. Thanks for listening to another great episode. Bridge the gap.

Outro

Thanks for listening to Bridge the Gap podcast with Josh and Lucas. Connect with the BTG network team and use your voice to influence the industry by connecting with us at btgvoice.com.