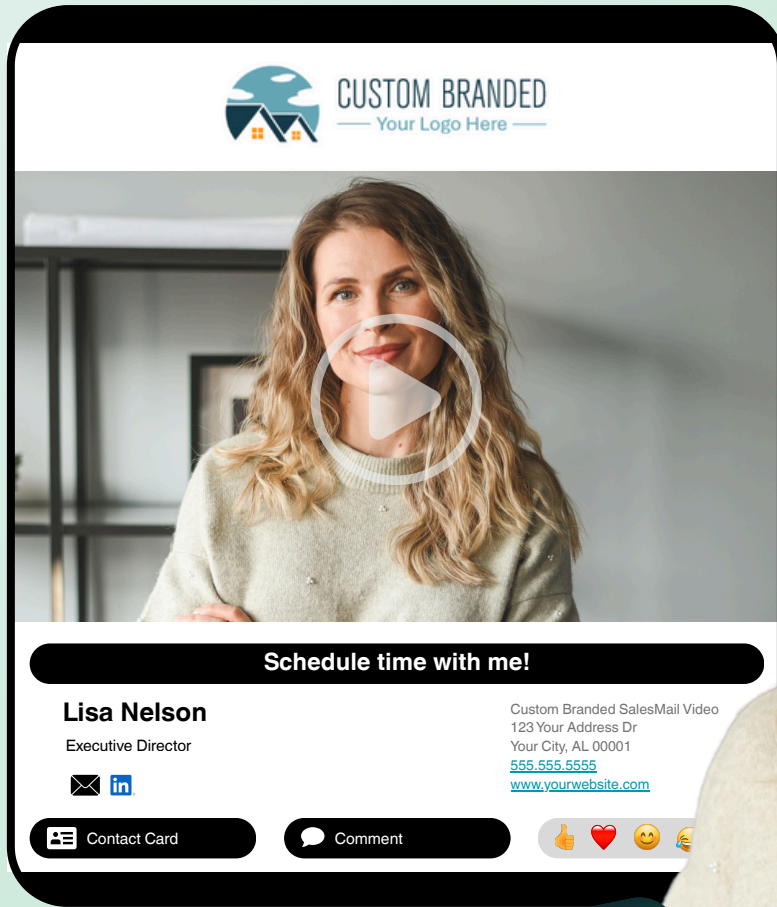




connection report

operationalizing a
personalized sales process



4.9 star rating

6x ROI

98% approval rating

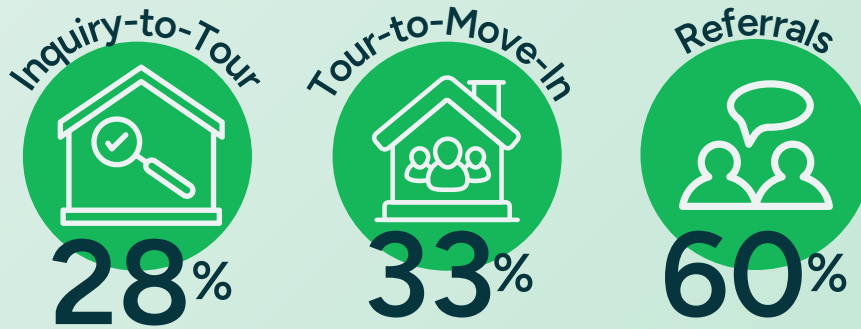


These insights are taken from all care levels. Find more detailed breakdowns by care level on the following pages.

The best performing senior communities demonstrated a higher commitment to improving speed-to-lead and inquiry-to-tour. Additionally, communities that implement personalization from the very first touchpoint see more prospects moving further down the pipeline - this is speed-to-connection.

Redefining a "lead" as a "connection" when a real touchpoint has been made is a key indicator for top performing sales teams.

Understanding these metrics is important. It is equally important to identify where inquiries come from. The methodology for how you nurture a prospect can vary wildly depending on the source. Research shows that more than 60% of new move-ins are a result of referrals. This includes but is not limited to resident referrals, industry partners, and families.



industry averages provided by Aline CRM

sales cycles & length of stay

Studies have shown a significant correlation between the average sales cycle duration and the length of stay. The result? **Sales cycles that fall under 30 days result significantly in shorter length of stays.**

Operators with the most success find a balance between longer sales cycles and low-acuity move-ins resulting a much more manageable, stable, and profitable length of stay.



source: Aline CRM

Over the past several years Independent living has seen an increase in inquiries. Average monthly inquiries increased 13% resulting in a 13% increase in activities from Sales Directors.

27

avg. activities/move-in

2 tours
6 calls
8 planning session

1 home visit
3 CFUs
5 advances






11.2h

avg. time selling











Increasing Speed-to-Connection

Introducing personalization - both automated and not - can significantly reduce the sales cycle without negatively impacting the length of stay. Try implementing a similar inquiry response cadence like the one shown below:














Before Contact

-  Evergreen Video Inquiry Response
-  Planning Session
-  Email
-  Text
-  Planning Session

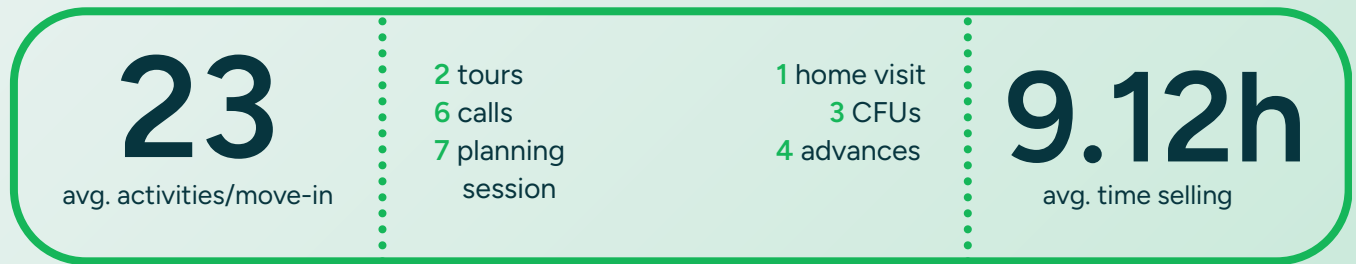
Contact to Tour

-  Email
-  Planning Session
-  Personalized Video Pre-Tour Reminder
-  Phone Call/Voice Mail
-  Planning Session
-  Text
-  Face-to-Face - TOUR
-  Personalized Video Thank You for Touring
-  Phone Call/Voice Mail
-  Planning Session

Tour to Move-In

-  Email
-  Phone Call
-  Planning Session
-  Text
-  Face-to-Face - TOUR
-  Email
-  Planning Session
-  Personalized Video Agreement
-  Phone Call/Voice Mail
-  Planning Session
-  Face-to-Face - Home Visit
-  Evergreen Video Move-in Instructions
-  Email

Over the past several years Assisted living has seen a decrease in inquiries. Average monthly inquiries decreased 10%. Even so, there was a 10% increase in activities from Sales Directors over this same time period.

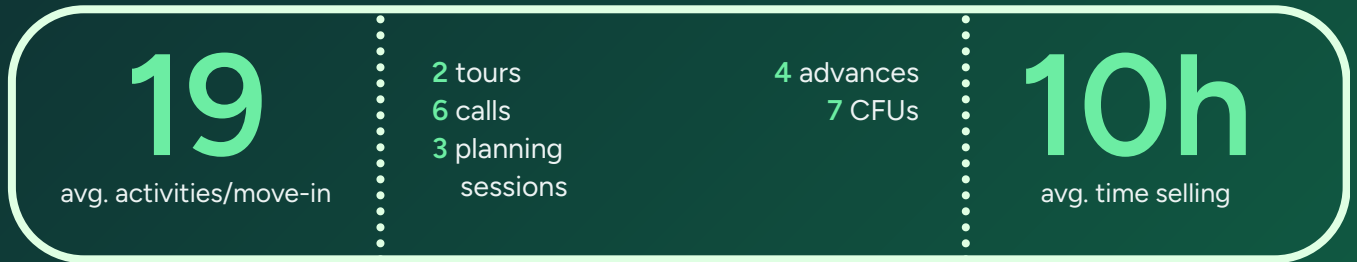


Increasing *Speed-to-Connection*

Introducing personalization - both automated and not - can significantly reduce the sales cycle without negatively impacting the length of stay. Try implementing a similar inquiry response cadence like the one shown below:

Before Contact	Contact to Tour	Tour to Move-In
Evergreen Video Inquiry Response	Email	Email
Planning Session	Planning Session	Phone Call
Email	Personalized Video Pre-Tour Reminder	Planning Session
	Phone Call/Voice Mail	Text
	Face-to-Face - TOUR	Face-to-Face - TOUR
	Personalized Video Thank You for Touring	Email
	Phone Call/Voice Mail	Planning Session
	Planning Session	Personalized Video Agreement
		Phone Call/Voice Mail
		Planning Session
		Face-to-Face - Home Visit
		Evergreen Video Move-in Instructions

Over the past several years Memory Care has seen an increase in inquiries. Average monthly inquiries increased 3%. Despite this, there was a 5% decrease in activities from Sales Directors.



Increasing *Speed-to-Connection*

Introducing personalization - both automated and not - can significantly reduce the sales cycle without negatively impacting the length of stay. Try implementing a similar inquiry response cadence like the one shown below:



Is It Time for a Sales Reset?

Reassess your competitive environment and goals.

Are you trying to increase occupancy or maintain a strong waitlist? Personalized video can help you stand out no matter your market position.

Know where your leads are coming from.

Use your reporting tools to understand which sources produce the highest conversions—and support those touchpoints with SalesMail videos to increase speed-to-connection and engagement.

Understand how your team is spending their time.

If time is being lost to cold outreach or unproductive follow-ups, introduce SalesMail to humanize communication and boost response rates.

Evaluate partner performance.

Talk with your teams about how they collaborate with referral and aggregator partners. SalesMail videos can strengthen those relationships, set clearer expectations, and improve conversions from partner-generated leads.



Making the Move (and Making It Count)

Start with your strengths.

Identify which communities, markets, or team members can maintain strong performance during a shift in lead strategy and equip them with SalesMail to amplify their impact.

Set clear expectations with leadership and your team.

If lead volume changes, you'll need a plan. Align on what will shift, how performance will be measured, and how SalesMail can support stability through stronger engagement.

Train your team intentionally.

Help your team understand where saved time should be reinvested - whether that's deeper online lead nurturing, better referral source communication, or higher-quality touchpoints with fewer prospects. Provide SalesMail best practices to guide every stage of the funnel.

salesmail connection report | 2025






samples sales process using






01

Website Inquiry

- 
Inquiry Response
 Pre-recorded automated video message
- 
Phone Call
 Leave a voicemail, reference video you are about to send them
- 
Personalized Inquiry Response
 Send after leaving the voicemail, introduce yourself, invite to tour




02

Pre Tour

- 
Text Reminder
 Confirm the tour three days prior
- 
Pre-Tour Reminder
 Share relevant details and expectations the day before
- 
Text Reminder
 On the day of, let them know you're excited to meet




03

Post Tour

- 
Thank You Video
 Follow-up with relevant information and next steps
- 
Email Follow-Up
 Provide promised deliverables and solicit questions within 24 hours
- 
Phone Call Follow-Up
 Address questions and define next steps within 48 hours, leave a voicemail

04

Deposit Received?

- 
Personalized Video: Follow-Up
 Send after about a week,
 Invite to send deposit
 Invite to re-tour if no deposit received
- 
Email Follow-Up
 One week later,
 Send move-in details if deposit received
 Enroll in nurture cadence otherwise
- 
Personalized Video: Event Invites
 Continue to nurture: invite to community events

personalized video: sample scripts

Inquiry Response

"Hi, I'm [YOUR NAME], from [COMMUNITY]. Thank you so much for requesting more information about who we are and what we offer here at our community. I look forward to connecting with you, soon. Until we do, click the logo above to check out our website. My contact information is provided below, along with a link to schedule a tour at your convenience. I'm looking forward to answering your questions and providing you with the resources to make the best decision for yourself or your loved ones(s). Talk soon!"

Pre Tour Reminder

"Hi [THEIR NAME], I'm [YOUR NAME] from [COMMUNITY], here with a quick tour reminder! We're looking forward to welcoming you for your upcoming tour and giving you a feel for what life is like here at our community. Whether you're exploring options for yourself or a loved one, this visit is all about helping you gather the insight (and peace of mind) you need to make the right next step. Below, you'll find my contact information in case anything comes up before your visit. [PROVIDE RELEVANT DETAILS SUCH ASK PARKING OR OTHER EXPECTATIONS]. Can't wait to connect in person!"

Video Tour

"Hi [THEIR NAME], I'm [YOUR NAME] from [COMMUNITY]. I am excited that you are interested in [UNIT OR FLOOR PLAN]. Since you cannot be here in person, let's take a quick walkthrough of the space. [WALK THROUGH UNIT. HIGHLIGHT KEY AMENITIES. MAKE IT FEEL LIKE THEIR FUTURE HOME]. If you like what you see, I'd love to set up a time to get you here in person. Click the CTA button down below to access my scheduler and if you need anything my contact information is below as well. Cannot wait to talk more soon!"

Follow-Up

"Hi [THEIR NAME], I'm [YOUR NAME] from [COMMUNITY]. It has been quite some time since you initially reached out and since we last connected and that's totally okay. I just wanted to personally reach out and say: if you're still exploring options, I'm here. No pressure, no expectations... just support. Sometimes life gets busy, or plans change. But if senior living is something you're still considering, now or even later down the road, I'd love to be a helpful resource. Feel free to reply back or click below to grab time to chat. Either way, I'm wishing you all the best. Talk soon!"

Post Meeting Thank You

"Hi [THEIR NAME], I'm [YOUR NAME] from [COMMUNITY]. Thank you so much for taking the time to meet with us today. We truly appreciated the opportunity to share our community. [INSERT SOMETHING SPECIFIC THAT YOU LEARNED DURING THEIR VISIT]. If you'd like any additional information, materials, or clarification on what we covered, please don't hesitate to reach out. My contact information is provided below, along with a link to schedule a follow-up at your convenience. We're here to support you in any way possible, and I look forward to connecting again soon. Thank you once more, and have a wonderful day!"

Event Invite

"Hi [THEIR NAME], I'm [YOUR NAME] from [COMMUNITY]. I hope you are well! I wanted to take a moment to invite you to our upcoming [EVENT]. We will have [SHARE SOME DETAILS ABOUT EVENT]. This is a perfect opportunity for you and/or your loved one to meet some of our residents, connect with the staff and see if [COMMUNITY] is the right fit for you. Click below to RSVP and if you have any questions in the meantime, please reach out - as always, my contact information is below. We hope to see you at [EVENT] and talk soon!"