

OpenDoor
Sales Consulting & Training

3 KEYS to a Full House™

presented to:



2025 Spring Conference
Hilton Easton Columbus

Bobbie Antinarelli, Principal
May 14, 2025

Ohio's Commitment to Innovation in Senior Care

Assisted Living Waiver Program

Care for eligible Medicaid members to receive care in an AL environment vs. nursing home placement

Healthy Aging Grants

Addressing SDOH and helping seniors to age in place in their home or community

We have music in common!

- **Ohio** is home to the **Rock & Roll Hall of Fame**
- **MA** is home to **Berklee College of Music**





Our Agenda

- ☐ Hellos and Intros – Bobbie Antinarelli
- ☐ Expectations and Common Challenges
- ☐ Overview of 3 KEYS to a Full House™ program

- 1. **Relationships** – Branding, Value and Building a Pipeline
- 2. **Referrals** – Reaching out and Using Tech to Track
- 3. **Retention** – Assessing Initiatives and Building a Strategy

- ☐ Engagement and Discussion



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Occupancy through *Care* and *Connection*

CARE

- Shift from tenant / landlord model to aging in place with tiered care support
- Holistic approach with medical and therapeutic integration
- Integration of wellness and hospitality with concierge style amenities

CONNECTION

- Referral sources are everywhere. Ongoing engagement keeps you top of mind
- Make new friends, keep the old: Referral sources shift – and turnover happens
- Meaningful engagement for residents enhances well –being and longer life

3 KEYS TO A FULL HOUSE™



RELATIONSHIPS

Establish Branding and a Prospect Pipeline



REFERRALS

Implement Outreach Programs and Events



RETENTION

Monitor Programs and Refine Campaigns

Establish Branding and a Prospect Pipeline



RELATIONSHIPS

Articulate your value:

- Clarity about your differentiation and care offerings
- How would your community describe you?

Define Contact Profiles

- Referral groups: professional; community; family
- Categorize into groups for targeted outreach

Use Technology

- Document all contacts, interactions, and activities
- Tailor a CRM to capture contacts and categories

Brand: Foundation of Trust, Loyalty, and Success

Every Organization Must Address Brand....

- 1. Identity:** Who You Are & What You Stand For
- 2. Perception:** What People Think & Say About You
- 3. Promise:** The Value You Deliver
- 4. Experience:** Every Interaction Shapes the Brand
- 5. Differentiation:** Standing Out in a Crowded Market
- 6. Visibility:** Staying Top of Mind
- 7. Evolution:** Adapting Without Losing Identity



BRANDING: The Rule of '7'

BRANDING

- Consistency is KEY- clear, cohesive messaging across all touchpoints
- More than a logo - experience, trust and reputation you build
- Every interaction reinforces your brand
- Brand is perception and drives decisions

RULE OF '7'

- Repetition builds familiarity; a single touchpoint is not enough
- Reach out using multiple channels; be sure to follow up
- Repetition creates recognition
- Time and trust go hand in hand

Referrals are..... Everywhere

PROFESSIONAL

- Hospitals and clinics
- Rehab Centers
- Urgent Care Facilities
- Councils on Aging
- Gerontologists
- Geriatric Care Managers
- Social Workers
- Therapists

COMMUNITY

- Police, Fire, EMT
- Dentists
- Elder Law Attorneys
- Pharmacists
- Urgent Care
- Independent Living
- 55+ Communities
- Senior Centers
- Churches / Synagogues



FAMILY

- Residents
 - Families
 - Friends
 - The entire residence
- Leadership, owner/operators,
ED's, marketing, vendors, staff

Employees as Ambassadors!

Implement Outreach Programs and Events



REFERRALS

Identify communication channels and events:

- Research where you need to be to engage
- Utilize social media and email initiatives

Tailor messaging for outreach:

- Craft messaging pertinent to each referral group
- Develop scripts and soundbites across all events

Use Tech to Track:

- Update CRM data as you gather more intel
- Customize CRM to capture the referral trail



Launching your Referral Initiatives

PERSONAL OUTREACH

- Meet your referral sources 1:1
- Foster hospital and provider partnerships
- Provide venue / food for others' meetings
- Host internal events and meetings
- Attend community events
- Conduct lecture or education events

DIGITAL OUTREACH

- Email campaigns and social media
- A newsletter – maybe more than one
- Lead capture forms & testimonials
- Website, Blog, Social Media Posts
- Direct Mail
- Cohesive and consistent - *Rule of '7'*



Using Tech to Tailor and Track

IDENTIFY REFERRAL SOURCES

- Capture every contact and referral source
- Categorize people and organizations
- Log all interactions and schedule follow up
- Train staff to use and share consistently
- Support and share information to ensure CRM is up to date

IDENTIFY REFERRAL TRAIL

- Customize fields and reports to capture data
- Create to-do's for efficiency and tracking
- Enter data in real or near real time
- Segment groups for targeted outreach
- Document a referral trail from inquiry to move-in – assessing the referral ratio

Customer Relationship Management (CRM's)

Platforms to Consider:

- Yardi
- Eldermark
- ECP
- Sherpa
- WelcomeHome
- PointClickCare
- Enquire (Aline)

What are you using for tech?

What to Look for:

- Document and categorize referrals sources
- Scheduling and tracking activity
- Follow up on tasks, meetings, emails, calls
- Customizing and adding fields
- Referral outreach and tracking the trail
- Data analytics – referral to move-ins
- Integration w email

Outline your needs prior to requesting a demo

Monitor Programs and Refine Campaigns



RETENTION

Assess engagement and revise

- Refine communications and track improvement
- Ensure you're in sync across all channels

Maintain momentum

- Repeat your initiatives and track success
- Identify your key channels and events

Create a calendar and annual strategy

- Plot pertinent events and initiatives by month
- Roll up to an annual plan with ongoing review

Annual Communication Outreach Strategy

- **Evaluate Communication Effectiveness**

Review email open rates, social media interactions, and website traffic

- **Analyze Past Outreach Performance**

Review event attendance, referral sources, digital metrics, and referrals

- **Identify Top-Performing Initiatives**

Including in-person, digital, networking, referrals and inquiries to move-ins

- **Develop a quarterly / annual plan and monitor it**

Identify the most effective initiatives and integrate those into your ongoing communication plan

Plot your Plan and Track Success

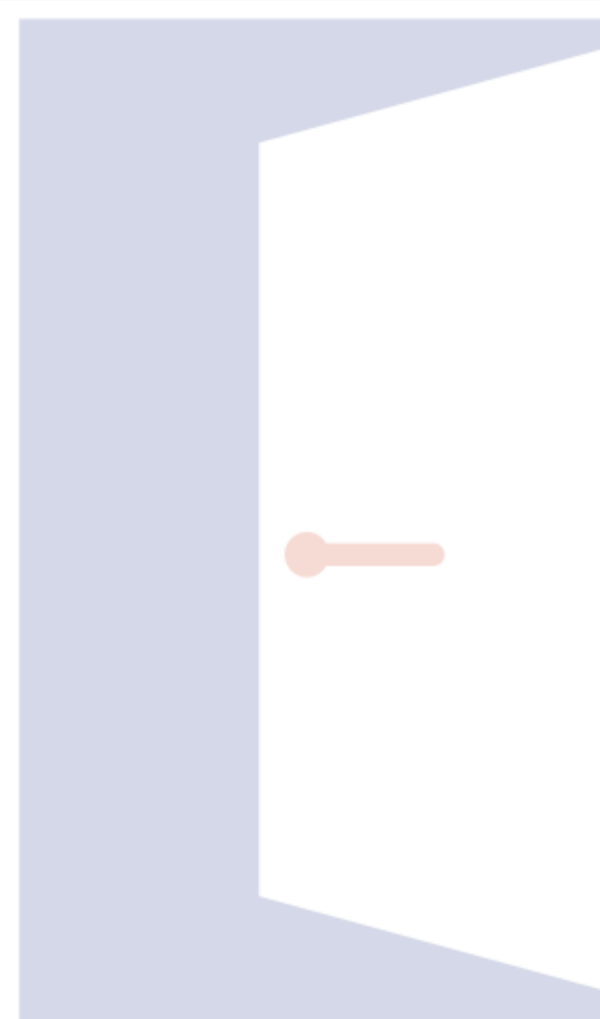
- Take it quarter by quarter
- Use your CRM to track people and events
- Assess the engagement level
- Note your spending and budget impact
- Use your calendar as a guide
- Maintain momentum and continue to monitor
- What brought success, referrals, residents?

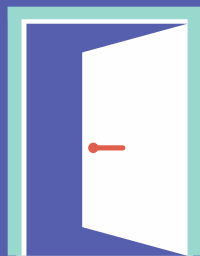
That will define your annual strategy



Wrap up/ Discussion

What might you implement right away with your current staff and resources?





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Thank You!
Here's to your Full House

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