

REPS Leads

Beverwyck Retirement Community case study

Facility profile

Located just outside of Albany, N.Y., Beverwyck Retirement Community, part of Eddy Retirement Living, is a full-service independent retirement living community offering 168 one- and two-bedroom apartments, 15 cottages, 14 new deluxe cottages, and an assisted living residence with 41 private apartments. Residents at Beverwyck can choose from a variety of comfortable one- and two-bedroom apartments, some featuring dens, to suit their particular taste and lifestyle. In addition, residents enjoy a vast array of amenities, including a country store, fitness center, library, lounges and beauty/barber shops, as well as beautifully landscaped grounds, walking paths and gardens.

For the last 20 years, Eddy Retirement Living, part of the Northeast Health Network, has served the Capital Region of New York State with safe, beautifully appointed retirement communities. In addition to Beverwyck, Eddy Retirement Living has five other retirement living communities. Each of the campuses includes both Independent Living and Assisted Living and sets the standard for premier care in the region. Two of the campuses also include Memory Care communities. Reaching 22 counties and serving more than 30,000 people annually, Eddy Retirement Living helps maximize independence, quality of life and dignity of individuals.

Challenges

- Rapid growth of the organization
- Lack of reporting capabilities
- Incomplete lead maintenance and tracking
- Inefficient business processes

Solution

REPS Leads, part of the MDI Achieve suite of eldercare solutions, is the industry's leading software solution for lead management, marketing, inquiry, and referral source tracking. Web-based and easy to set up, REPS Leads allows users to manage all of the vital information necessary to fill senior living communities. With REPS Leads, prospects never slip through the cracks. REPS Leads also offers monthly scrubbing against the National Do Not Call Registry.

Results

- Extensive reporting capabilities
- Organized system for lead tracking
- Centralized database
- Easy accessibility
- Consolidated financial reporting using data warehouse

A long-time client of **REPS Leads**, Beverwyck Retirement Community in Slingerlands, N.Y. has been using the marketing and sales management software for the past 11 years. Currently, there are six Eddy Retirement Living Communities and all are using REPS Leads to manage their business. Donna Baker, Marketing Assistant at Beverwyck Retirement Community, recalls, "Prior to REPS Leads, all lead management was done with index cards. As the organization grew, there was a definite need for a reliable data maintenance system."

REPS Leads helps track and manage important data

By switching to REPS Leads, the organization found an effective way to track and manage important data streaming into the organization. Leads are tracked from inquiry to move-in with quick access to every detail of an account. "A priority for our community is being able to review how many leads are generated within a given time frame," states Baker. "REPS Leads allows us to go a step further and identify and report on the source and market area of those leads, pertinent information in evaluating marketing strategies and for planning purposes," adds Baker.

In addition to lead management, REPS Leads offers the organization an effective way to manage staff and the sales process. "As the marketing assistant, I run daily, weekly and monthly diary reports that show scheduled and completed sales activities. I give these reports to the Sales Directors for easy monitoring of sales staff performance in any given period," says Baker.

Web-based means real-time information when you need it

In 2006, Baker saw improvements to the REPS Leads system when the Eddy communities moved to the web-based version. "It really decreased the amount of down time we experienced with Windows and it's much more efficient. The system is so user-friendly that even non-technical users can enter information easily," says Baker. Being web-based also means users can access information anytime, anywhere. Real-time information can be obtained from home, on the road or in the office. An additional

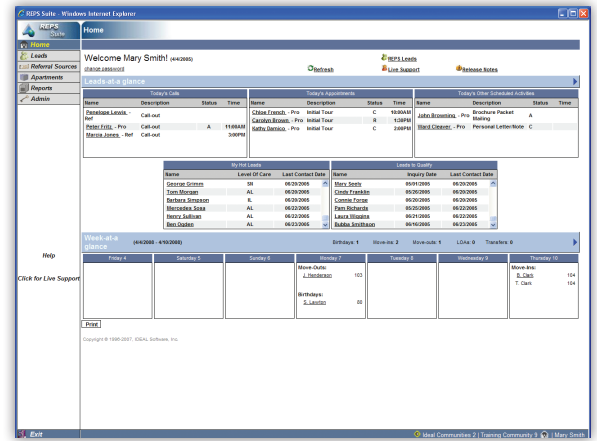
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benefit of being web-based is that data from all six communities is stored in one central location, allowing for comprehensive reporting and analysis.

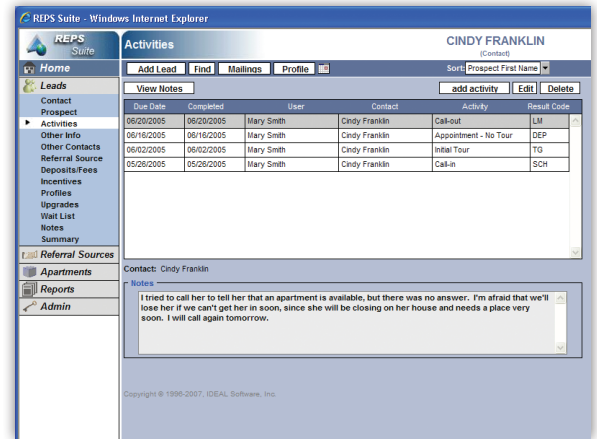
“The biggest feedback I hear from staff is that REPS Leads is specifically designed for the eldercare industry which is a huge benefit for our organization. We have some staff that worked for other retirement communities that didn’t use REPS Leads and they feel that REPS is much more pertinent and comprehensive to our industry,” adds Baker.

Confident in MDI Achieve

Baker is also satisfied with the partnership that her organization has with MDI Achieve, who makes the REPS Leads product. “I feel confident that if an issue or questions arise, the tech support at MDI Achieve will be able to help me on the spot. Furthermore, I also know that MDI Achieve will keep me updated on major changes to the product that will improve our business efficiencies.”



REPS Leads - Leads-at-a-glance screen



REPS Leads - Activities screen