

## REPS Leads

## Greystone Communities case study

### Facility profile

Greystone Communities of Irving, Texas was founded in 1982 and today is a leading provider of innovative programs and services for the senior living industry. The company helps their clients protect their investment and enhance their senior living communities through planning, development, management, and marketing consulting services.

### Challenges

- Rapid growth
- Central database demands
- Reporting requirements

### Solution

#### REPS Leads

REPS Leads 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 you to manage all of the vital information you need to fill your communities. REPS Leads also offers monthly scrubbing against the National Do Not Call Registry.

### Results

- Organized system
- Online access
- Increased sales
- Information access across company
- Improved productivity and accountability
- National Do Not Call Registry compliance

Based in Irving, Texas, Greystone Communities was founded in 1982 and today is a leading provider of innovative programs and services for the senior living industry. The company helps their clients protect their investment and enhance their senior living communities through planning, development, management, and marketing consulting services. These communities typically include independent living apartments and cottages, assisted living and memory support suites, long-term care and specialized Alzheimer's units.

Greystone has worked with more than 300 organizations in the areas of consulting, development, marketing and management. They employ about 200 corporate and community team members. And while the company doesn't own any properties, the marketing representatives in a pre-opened property are all Greystone employees, as are their managed communities' executive directors.

### Needs of a Growing Organization

When Corporate Vice President Rick Hunsicker came to Greystone, the company was using ACT for its marketing and lead management requirements. An off-the-shelf program, ACT was too limited for this growing organization's needs.

"Greystone differentiates itself from the competition with an integrated and flexible approach that delivers tailored services designed to achieve a client's specific goals," says Rick. "We were looking for a new system that was tailored to our industry, with better reporting capabilities."

"We found that reporting capability and individual focus was not existent in ACT, and we needed to upgrade to leading edge software," explains Rick. "Greystone chose to seek proposals from MDI Achieve, and specifically their REPS Software, a leading software provider to the eldercare industry."

### A Perfect Fit

Why did Greystone choose REPS Leads? "We felt an instant comfort level in doing business with MDI Achieve's REPS Software" explains Rick. "We weren't going with a vendor that was behind us in software development and application uses. The REPS staff at MDI Achieve had been doing this work for retirement communities longer than anyone else and approached us as a partner, not another install."

### Making it Work

Switching all of their existing communities from ACT to REPS Leads took about two years. All of Greystone's new communities came on board with REPS Leads right away. The implementation to the new system was "very well organized and thought out," he notes.

The initial set up involved several full day “needs assessment” meetings to outline what codes and fields best suited Greystone’s needs. After these first meetings, the two companies worked together on weekly conference calls as the detailed and delicate work of conversions to REPS Leads proceeded.

Accuracy on converting codes and transferring data was a key part of the implementation plan. To streamline the process and ensure the new software was used to its fullest capabilities, Greystone hired a full-time staff person to lead the conversion from the old system to the new, to provide support for the Greystone specific enhancements, and to provide REPS Leads training. They took the REPS Leads curriculum from MDI Achieve and adapted it to their company’s own specific, customized fields and needs.

Since the initial implementation in 2001, Greystone has added even more customized fields to REPS Leads. This has allowed them to better track and enhance their captured data.

## **Partnering for Success**

Together, Greystone and MDI Achieve have worked to push the use of REPS Leads into a fully integrated sales program. Feedback from sales counselors in the field has helped improve the software. “They’re always responsive and willing to listen to and implement ideas to enhance the program,” says Rick.

One of the best improvements to date has been making REPS Leads Web-based. “The Internet version was a pretty significant leap,” says Rick. “It came much quicker than expected and was well developed at inception.”

The movement to the Internet has added user friendliness and most importantly, the staff is able to access REPS Leads data anywhere, at any time. “This has been the largest significant benefit with the most positive impact,” he adds.

“Salespeople and managers can access data from home, a hotel, or the airport and have real-time information, activity and results at their fingertips.”

## **Devoted to REPS Leads**

While Rick claims to be the biggest REPS Leads fan in his company, other devotees include sales counselors, regional marketing directors and managers, and marketing assistants - all of whom are using the system to its maximum potential.

The company is even beginning to have some staff members in other Greystone departments look at the data in REPS Leads. Ultimately, they are moving toward giving various departments and individuals access to information that is appropriate for their role.

## **Return on Investment**

While it’s difficult to attribute specific numbers to using REPS Leads, Rick says that time and money savings are “significant” compared to not having such a software system. “The fact that it’s industry specific is huge.”

“If we make one additional sale a month - in each community - for a year because of information used in REPS Leads, with average monthly fees of \$3,000, that’s \$234,000 additional revenue each year,” explains Rick.

## **Overall Impact of Using REPS Leads**

One good measure of Greystone’s commitment comes straight from their policy of entering all activity into REPS Leads. “We tell our team that if it’s not in REPS Leads, it didn’t happen.”

This is a company-wide philosophy that represents the impact of using this customized software as the staff tracks leads and activities from start to finish.