



## **SALES AND MARKETING ROUNDTABLE #265** **A Full Funnel Media Approach for Lead Generation** **with Jeremy Freeman**

Thank you to everyone who attended our latest Sales and Marketing Roundtable!

NOTE: To provide anonymity during the Roundtable discussion, participants and their communities will not be identified.

### **ABOUT OUR GUEST**

This week on Varsity's Roundtable, we were joined by Varsity Media Director Jeremy Freeman. Jeremy discussed how a full funnel media strategy can drive more qualified leads, from building awareness to converting prospects.

He shared real-world examples, key metrics and practical tips to help you optimize your media mix for maximum impact, including meeting residents where they are, how the resident journey informs media strategy and how multiple channels can work together to make each channel more effective. Whether you're refining your current strategy or starting fresh, the session was packed with actionable insights.

**VARSITY**  
**ROUNDTABLE**  
**PROJECT**  
DISCUSS. SHARE. LEARN. GROW.

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**A FULL FUNNEL MEDIA APPROACH  
FOR SUCCESSFUL LEAD GENERATION**

THURSDAY, JULY 10, 2025

FEATURING  
**JEREMY FREEMAN**  
Media Director, Varsity



## FRESH PERSPECTIVES

- **MULTI-CHANNEL MARKETING ISN'T OPTIONAL—IT'S ESSENTIAL** - Gone are the days when a single channel could drive results. Today's media landscape requires layered strategies that span TV, digital, direct mail, and more. When done right, this surround-sound approach leads to significantly higher lead quality and conversion.
- **MEDIA STRATEGY STARTS WITH THE MOVE-IN** - Effective planning begins at the end—understanding who your residents are and how they got there. By reverse-engineering the journey, communities can identify which channels and messages work best at every stage, from awareness to action.
- **EVERY TOUCHPOINT MUST DO DOUBLE DUTY** - Branding and lead generation aren't separate goals, they work together. Whether it's a video ad or direct mail piece, each message should build brand familiarity *and* drive the next step, like a form fill, RSVP, or website visit.
- **OLD MEDIA STILL WORKS—JUST USE IT STRATEGICALLY** - TV, radio, print, and direct mail haven't been replaced, they've been *joined* by digital. These channels still spark awareness and trust, especially in older audiences. Smart marketers blend formats based on message type, frequency needs, and budget.
- **YOUR CRM IS THE REAL SOURCE OF TRUTH** - Forget gut feelings, data should drive your media decisions. UTM tracking and CRM integration reveal which channels actually deliver quality leads. That insight helps refine strategies, allocate budgets, and avoid wasting time on what doesn't work.
- **STAY VISIBLE, EVEN WHEN TIMES ARE TOUGH** - During downturns, the instinct may be to pull back, but staying present keeps your brand top of mind. Even low-level spending helps preserve awareness, while competitors who go dark struggle to recover when the market rebounds.

## LINKS & CONTACT INFO

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## COMING UP ON VARSITY'S ROUNDTABLE!

Please join our next Roundtable gathering on Thursday, July 17 at 12 p.m. ET, 11 a.m. CT and 9 a.m. PT. We'll be joined by Ryan Young from Morgan Stanley. Ryan will be sharing Morgan Stanley's perspectives on the field of senior living.

## NEW ON VARSITY'S PODCAST, ROUNDTABLE TALK

The most recent episode of Varsity's podcast, Roundtable Talk, features a conversation with Marvell Adams, Jr., a longtime leader in aging services and the founder of W. Lawson, a consulting firm focused on equity and inclusion. He also serves as CEO of Caregiver Action Network, supporting millions of unpaid family caregivers across the country.

In the episode, Marvell discusses the emotional realities of caregiving, the importance of succession planning, and why the future of senior living must be more inclusive, intergenerational, and community-connected. Check it out on the [Roundtable Talk page](#) of the Varsity website!





“  
There is no right or wrong media strategy  
- only more or less effective  
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Media plans are easy to justify on paper, but what really matters is whether they actually work. There's no such thing as a perfect strategy, just ones that are more or less effective. And if the plan isn't hitting the mark, that's not a failure—it's just a signal to pivot. Media's constantly evolving game, so it's totally normal (and expected) to keep adjusting as habits shift and new data comes in. The real miss is not tweaking the approach when it's clearly time to.



## Meet Potential Residents Where They Are

Media planning isn't just about crunching numbers, it's where science meets art. Sure, data's crucial, but the magic really happens when you blend that with real-world experience and intuition. At the heart of it all is understanding the customer. It's about showing up in the right place at the right time for people who might need your community, even if they don't realize it yet. Especially now, post-pandemic, people are doing their homework. They're more informed and intentional about the resident journey than ever before.



## 15+ TOUCHPOINTS TO CONVERT

- ▶ The introduction of digital touch-points has increased the volume of marketing messages consumers are exposed to
- ▶ 10+ exposures to result in an MQL (Marketing Qualified Lead)
- ▶ Another 3+ touch-points to transition to an SQL (Sales Qualified Lead)
- ▶ Yet another 2-20 additional touch-points are required to convert to a resident/depositor

Breaking through the noise these days takes way more effort than it used to. Back in the day, three exposures might've been enough to grab someone's attention and inspire action, but those days are long gone.

With digital media and an explosion of new channels, it now takes 15 or more touch points just to get someone to engage. In fact, just getting someone to raise their hand as a marketing-qualified lead usually takes over 10 exposures. From there, you need a few more interactions to convert them into a sales-qualified lead, and then a couple more to actually get them to sign on as a resident.

Bottom line: it takes a whole lot of consistent messaging across multiple channels to move someone along the journey.



## AVERAGE TOUCHES PER MOVE-IN



### Independent Living

24 Total touches / 4 Face-to-face



### Assisted Living

15 Total touches / 3 Face-to-face



### Memory Care

12 Total touches / 2 Face-to-face

Aline Benchmark Report

Different services require different approaches. Independent living, for example, usually takes more effort than memory care. Depending on the person's journey, it might take anywhere from 10 to 30 touchpoints to move someone from totally unaware to making a deposit or moving in.

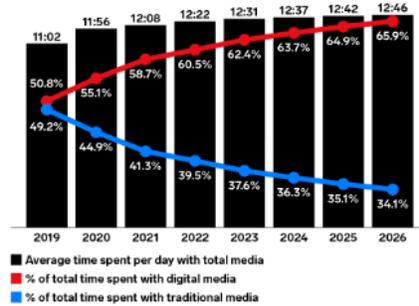
Those touches come from all directions: media campaigns, marketing automation, emails, sales calls—you name it. The good news? There are plenty of media options available to help make all those connections happen.



## NEW MEDIA OPTIONS ADD TO TIME SPENT

### Average Time Spent per Day With Total Media by US Adults, 2019-2026

hrs:mins, % of total time spent with digital media, and % of total time spent with traditional media



Note: ages 18+; includes time spent with digital internet activities (desktop/laptop, nonvoice mobile, connected TV, and other connected devices), print, radio, TV, and other traditional media including printed catalogs, direct mail, cinema, and out-of-home

Source: EMARKETER Forecast, June 2024

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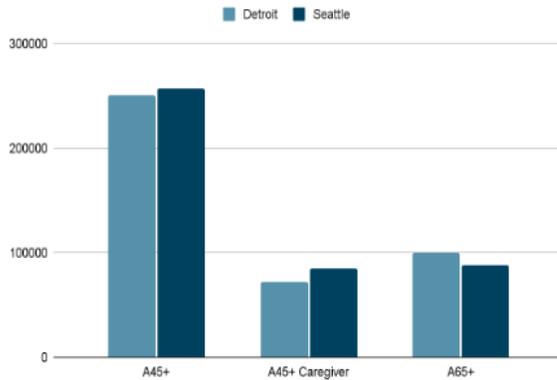
EMARKETER

Even for seasoned pros, the sheer number of media options can feel overwhelming. But here's a helpful way to think about it: new media never really replaces the old stuff—it just adds to it.

We didn't stop painting ads on buildings when newspapers came out, and radio didn't kill print. Same goes for TV, digital, and beyond. As new channels emerge, people somehow manage to squeeze more media time into their day. So instead of picking one over another, it's about smartly layering your approach to reach people wherever they are.



## WHILE EVERY COMMUNITY IS UNIQUE...



Source: MRI 2024 Doublebase, Nielsen Commspoint, Census 2020

### Detroit DMA Demographics

53% Female / 47% Male

Median Age 35.1  
45-54 = 12%  
55-64 = 7%  
65+ = 16%

Median HHI \$39,575  
\$100K+ = 15%

White = 12%  
Black = 77%  
Hispanic = 8%  
Asian = 2%  
Other/2+ = 1%

### Seattle DMA Demographics

49% Female / 51% Male

Median Age 35.5  
45-54 = 12%  
55-64 = 10%  
65+ = 13%

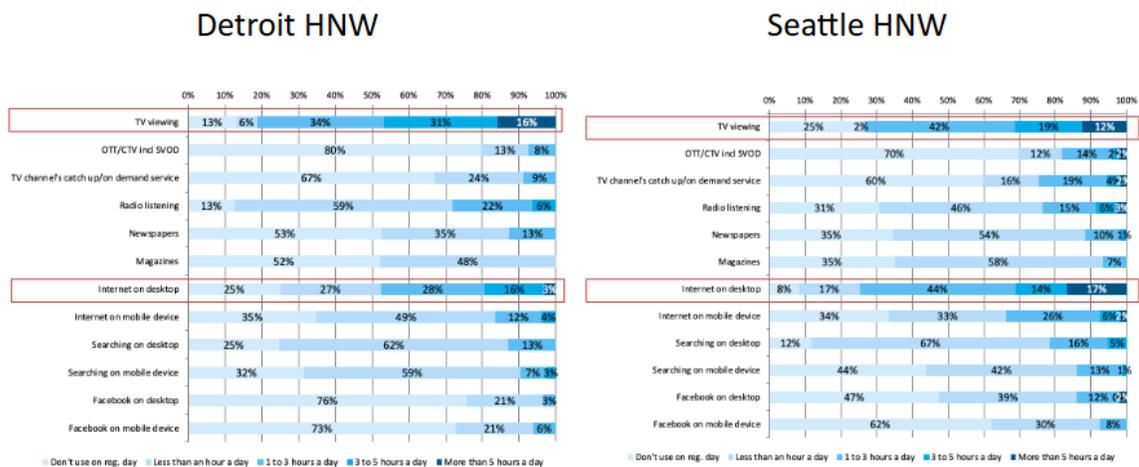
Median HHI \$121,984  
\$100K+ = 53%

White = 60%  
Black = 7%  
Hispanic = 8%  
Asian = 17%  
Other/2+ = 8%

Every community is unique, with different markets, competitors, resident profiles, and services. To show how much things can vary, take Detroit and Seattle. On the surface, they're similar in size and have some basic demographic overlaps, like age and gender splits. But dig a little deeper, and you'll find major differences in things like wealth and racial background. It's a great reminder that even when communities look alike on paper, their media strategies need to be anything but one-size-fits-all.



## ...NUANCED SIMILARITIES IN MEDIA USAGE CAN BE FOUND



Even though markets like Detroit and Seattle have big differences, when you look at media consumption, some patterns stay surprisingly steady. Sure, one area might watch a bit more TV or spend more time searching online, but overall, the mix of media channels people use tends to stay relatively consistent across the board, regardless of geography, race, or other demographics.

In both cities, for example, TV viewing and internet use on desktop stand out as top channels. The takeaway? Even with all the market-specific nuances, there are still reliable go-to channels. And while digital is huge, good ol' TV is still holding strong. It's all about being thoughtful and strategic with your media mix.



## MULTIPLE CHANNELS WORK TOGETHER TO MAKE EACH MORE EFFECTIVE

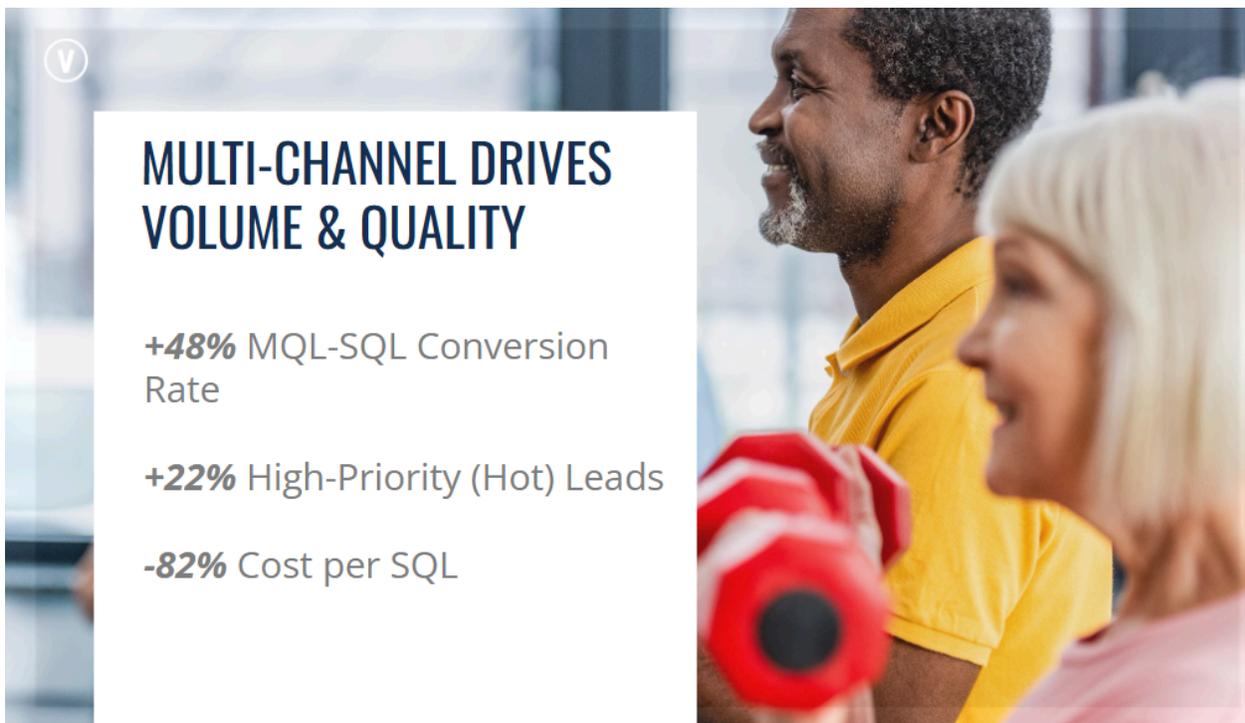
- ▶ 73% of consumers engage with brands across multiple channels
- ▶ +250% higher purchase and engagement rate from omni-channel marketing campaigns than single channel campaigns
- ▶ “Traditional” media channels dramatically increase search volume
  - TV: +57%, Out-of-Home: 46%, Print: +36% Radio: +29%
- ▶ Different channels provide different benefits - message format, reach/cume, frequency, ad engagement, etc.
- ▶ Different channels support the Residents’ Journey from need recognition through to move-in

It’s not just about getting more leads, it’s about getting the *right* leads. Sales teams aren’t going to chase people who aren’t qualified, so quality matters just as much as volume. That’s why relying on just one channel, like search, isn’t enough. Yes, it’ll get you leads, but at a small scale, and you’ll miss out on the full potential.

There’s loads of research out there (some of it self-serving), but the consensus is clear: multi-channel campaigns consistently outperform single-channel ones. Big brands like Nike, McDonald’s, and Coke aren’t running multi-million dollar omni-channel campaigns for fun, they do it because different channels bring different strengths to the table.

When it comes to senior living, the message is complex. You can’t always capture it in a quick banner ad. That’s where channels like video or print come in. They help explain the story in a more impactful way. In fact, consumers engaging across multiple channels are 250% more likely to purchase or convert. That’s huge.

Jeremy’s seen it firsthand with clients. Even traditional media like TV or out-of-home ads can drive online behaviors, boosting search volume, website visits, and email signups. People *do* remember those messages and take action, even if it’s not immediate. It’s all about being present in multiple places and reinforcing the message in different ways.



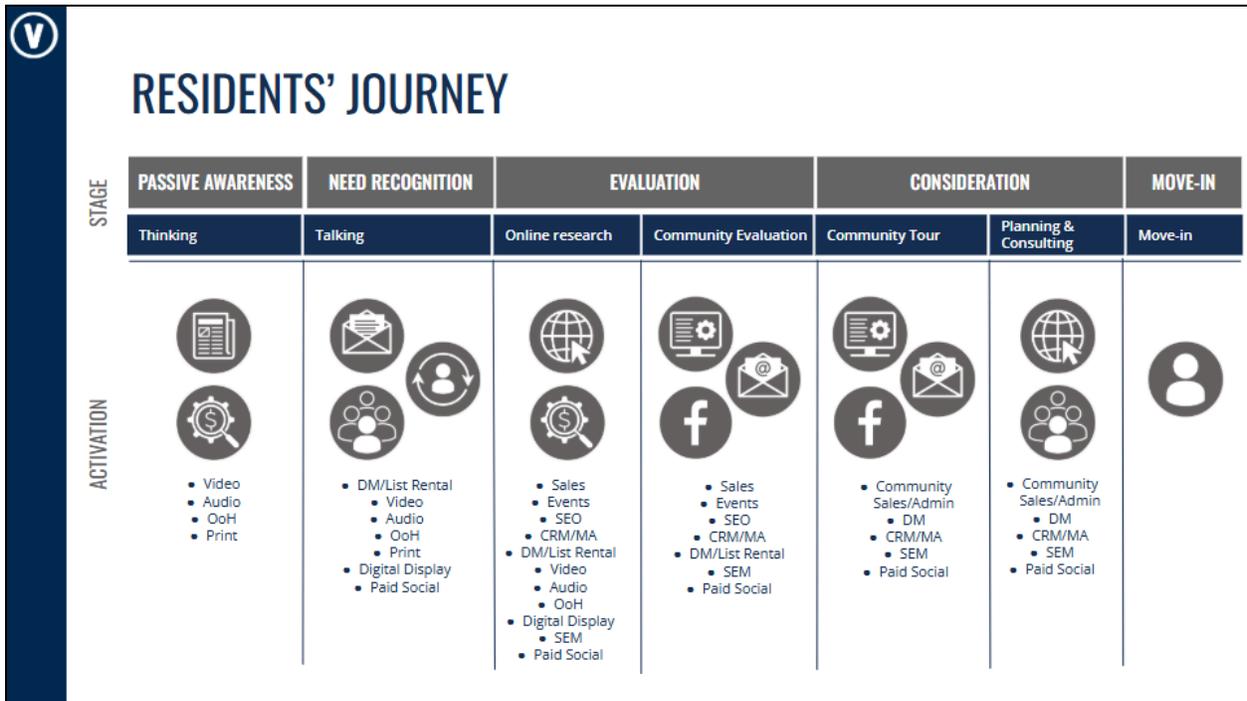
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## MULTI-CHANNEL DRIVES VOLUME & QUALITY

- +**48%** MQL-SQL Conversion Rate
- +**22%** High-Priority (Hot) Leads
- 82%** Cost per SQL

Yes, the extra effort behind multi-channel campaigns really does pay off. On average, clients see 40–48% more conversions from MQLs to SQLs and nearly a 25% boost in high-priority leads. That means more *and* better leads without blowing the budget.

It's proof that mixing channels is way more effective than going all-in on just one. The trick is to align your media mix with how your potential residents actually consume media. Think of each channel as a tool, some do things better than others, and the right combo can make a big impact, even without expensive data.



The funnel might not reflect reality these days—it’s more zigzag than straight line—but it still helps visualize the resident journey. It starts with people who aren’t even aware they need senior living and ends with move-ins or priority deposits.

The approach begins at that end goal and works backward. It’s about understanding who’s actually moving in, then building a strategy to find more people like them. That means thinking through budget, messaging, creative assets, and media mix. Interestingly, media plays less of a role near the end of the journey by the time prospects are touring communities, it’s all about personal interaction. Media’s job is to spark awareness and engagement early on, to help the community take it from there.

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## TOOLS IN THE TOOLBOX

				
Spot TV	CTV/OTT	Online Video (OLV)	Paid Social	Programmatic Display
Achieve rapid, widespread reach of the target audience.	Expand linear reach in living rooms to ensure coverage of cord-cutters and cord-nevers.	Efficiently broaden the reach and sustain the continuity of sight, sound, and motion creative in environments and contexts that align with the target audience's interests.	Engage consumers where they spend the most time — in a mobile-first environment.	Targeted online message to reach people when they are engage with content.
BEST PRACTICES				
Utilize a mix of Local Spot and OTT/CTV because target audience is heavy consumers of TV. Use for upper funnel Awareness			Due to poor targeting capabilities, utilize only for Event promotions.	

				
SEM	Direct Mail/CRM	Local Radio	Streaming Radio	Out of Home
Be present whenever consumers show interest in learning about your community to drive lower-funnel conversions. The hand raisers.	Build strong engagement with consumers who have already provided their information to create more touchpoints.	Engage consumers on the go with cost-effective, DMA-wide reminder messages that expand the audience beyond digital targeting.	Expand reach and increase message frequency across the market by leveraging digital targeting capabilities.	Engage consumers on-the-go while they are in their vehicles to boost overall awareness.
BEST PRACTICES				
Set-up with Service Lines, Brand and Competitor campaign sets.	Tie in with Paid Media efforts where applicable and ensure community sales teams are aware of details.	Utilize Traffic, Weather and News sponsorships to deliver messages specifically around upcoming events to reach broad awareness.	Utilize for Brand Awareness. Utilize Digital Billboard units for Events.	

There are endless media channels out there and just as many sales reps pitching them. The key to cutting through the noise is being crystal clear on what each channel brings to the table. Senior living is a complex message with a longer conversion path, so it's not as simple as picking the cheapest option.

Video, for instance, is a great fit. It's more expensive per thousand impressions, but it delivers. That higher price tag is justified by better performance, especially in lead quality. And if traditional TV spots are too pricey or inefficient, there are alternatives. Connected TV or OTT (like Roku or smart TVs) can deliver the same powerful video content at a lower out-of-pocket cost.

It all comes down to matching your message format—video, audio, or static—with the right channels that can deliver it effectively within your budget and strategy.



## THE RIGHT TOOL FOR THE JOB

- ▶ 1-Click Access to Informational Content/Lead Forms
  - Digital Display/Video, Paid Social, SEM, SEO, CRM/MA
- ▶ Offline to Online Drivers
  - TV/Radio, Print, OoH, Direct Mail
- ▶ Quickly Cume Awareness
  - TV/Radio, Connected TV, OoH, Digital Display/Video
- ▶ Manage Effective Message Frequency Levels
  - Connected TV, Streaming Audio, OoH, Digital Display/Video, Paid Social

Each media channel has its sweet spot. Video is great for complex messages and building reach fast, but it's not ideal for high-frequency messaging due to cost. For one-click actions, channels like digital display, paid social, search, and CRM are more efficient.

Traditional media—TV, radio, print, even direct mail—still work well for awareness. They may not offer instant clicks, but they stick in people's minds and drive action over time. To manage frequency affordably, layering in lower-cost options like streaming audio, connected TV, digital display, and social helps stretch your budget and boost impact.



## KNOWLEDGE IS POWER

- ▶ Data drives the strategy
- ▶ Be clear about what you know... and what you don't know
  - Create a learning roadmap along with your campaign strategy
- ▶ There are simple ways to implement tracking for channel attribution
  - UTM Parameters - snippets of text appended to a URL to track campaign data
- ▶ CRM as a source of truth
  - UTMs can help trace marketing activity from impression delivery through nurturing/MA activity to move-in

There's no perfect media mix—it's not about right or wrong, just what's more or less effective. And since you can't just "set it and forget it," data becomes your best friend. It helps guide adjustments, validate strategies, and make decisions feel a little less like guesswork.

Nobody knows everything – not agencies, not clients. But being open about that allows you to build a learning plan. Unsure if display ads will work? Test them. Use tools like UTM parameters to track what's driving leads, and connect that data to your CRM. It creates a clear line from ad exposure to actual outcomes.

Your CRM should be the go-to source of truth. It cuts through the noise and opinions, helping you see which channels are delivering real, qualified leads and which ones might need to be rethought or refined.

## QUESTIONS

### **CAN YOU DEFINE MQL (MARKETING QUALIFIED LEAD) AND SQL (SALES QUALIFIED LEAD) AND DEFINE WHEN YOU'RE LOOKING AT AN MQL VS AN SQL.**

An MQL, or marketing-qualified lead, is someone who's dipped their toe in. They've clicked an ad, filled out a form, or otherwise shown a little interest. They've introduced themselves but aren't necessarily ready for a serious conversation.

A sales-qualified lead, on the other hand, has gone further. They've been vetted a bit. Do they meet age and income requirements? Are they a good fit for immediate follow-up? These are the folks the sales team actually wants to engage with, not just someone who's passed by and waved.

### **WHAT IS A UTM? TO ME, IT SOUNDS LIKE A MEDICAL CONDITION.**

A UTM—short for Urchin Tracking Module—is a simple bit of code you can add to any digital link, like ads or emails. It helps track key details like which channel or partner drove a click, or even which email subject line got someone to your website.

Those little tags feed into tools like Google Analytics and your CRM, giving you insight into the who, what, when, where, and why behind each visit. It's a super handy way to understand where your leads are coming from and what's working in your campaigns.

### **AN ATTENDEE SHARED A TERM THEY LIKED FROM A LONGTIME MEDIA BUYER—THE "STEREO EFFECT," WHICH DESCRIBES THE IMPACT OF HEARING AND SEEING A MESSAGE FROM ALL DIRECTIONS. IT RESONATED WITH THEM AS A FITTING WAY TO EXPLAIN EFFECTIVE, MULTI-CHANNEL MARKETING.**

Jeremy agreed that the "stereo effect" is a great way to think about multi-channel marketing. He emphasized that it's often the subtle, subconscious cues that make the biggest impact. People rarely remember exactly where they saw an ad. Survey responses are usually way off, but the message still lands. Some channels just get more credit for the result, even though the whole mix plays a role.

**WHAT SHOULD WE KEEP IN MIND ABOUT LAST-CLICK ATTRIBUTION, ESPECIALLY WHEN PEOPLE ARE EXPOSED TO MULTIPLE CHANNELS LIKE TV, PRINT, OR BILLBOARDS, BUT ONLY THE FINAL CLICK—LIKE IN AN EMAIL—GETS THE CREDIT?**

Jeremy explained that last-touch attribution is the most commonly used method because it's the simplest. It credits the final interaction before a conversion, like clicking an email. But that doesn't tell the whole story.

Years of research, especially from big media companies trying to protect TV and radio budgets, showed that campaigns combining digital with traditional channels perform better than digital alone. It's that "surround sound" effect. Subtle, early messaging that sticks in the consumer's mind, even if it doesn't get direct credit.

Since potential residents don't always act immediately, those early impressions matter. Someone might engage after a search, but that search was influenced by prior exposure to other channels. To really understand what's working, brands use more advanced techniques like media mix modeling to measure the true impact of all channels, not just the last one.

**AN ATTENDEE OBSERVED THAT CONTINUING TO ADVERTISE DURING DOWNTURNS—LIKE THE RECESSION OR COVID—PAYS OFF. STAYING VISIBLE KEEPS YOUR BRAND TOP OF MIND, SO WHEN THINGS REBOUND, YOU'RE ALREADY IN A STRONG POSITION.**

Jeremy agreed completely, emphasizing that going dark is the worst thing you can do. Even maintaining a lower level of advertising helps preserve brand awareness and recognition. Once you stop entirely, that awareness erodes quickly, whereas a steady, even minimal presence keeps you in the game.

**IN SENIOR LIVING, WE CAN'T SEPARATE BRANDING FROM LEAD GENERATION—WE NEED BOTH AT EVERY TOUCHPOINT. HOW DO YOU SEE BRANDING AND LEAD GEN WORKING TOGETHER, AND HOW SHOULD THEY BE CONNECTED TO DRIVE MEANINGFUL ENGAGEMENT, LIKE VISITS TO CONTENT, WEBSITES, OR EVENTS?**

Jeremy agreed and emphasized that nearly all brands—outside of giants like Coke or

McDonald's—can't afford to run purely branding campaigns anymore. Even when messaging is focused on urgent calls to action, there still needs to be a focus on building awareness.

He noted that branding and lead generation aren't mutually exclusive. A single piece of creative—like a video—can both create emotional connection and drive action. Likewise, a click-driven digital ad can still reinforce brand presence. Every touchpoint needs to pull double duty: building familiarity *and* prompting the next step.

**WHEN IT COMES TO DIRECT MAIL, ESPECIALLY FOR OLDER AUDIENCES, IS IT MORE EFFECTIVE TO DRIVE RECIPIENTS TO AN EVENT RATHER THAN A WEBSITE? ARE THERE ANY BEST PRACTICES OR CAVEATS TO KEEP IN MIND WHEN USING DIRECT MAIL?**

Jeremy explained that direct mail is most effective when it includes a clear call to action, like signing up for an event or filling out a form. Purely branded mailers without a next step are largely outdated. Today's direct mail should build the brand *and* prompt action.

He also noted that while direct mail is great for the 45+ audience, it surprisingly resonates with Gen Z as well. Despite being seen as a digital-first generation, research shows they still pay attention to what arrives in the mailbox. So overall, direct mail remains a powerful tool for driving immediate engagement across age groups.

**WHAT GUIDANCE CAN YOU OFFER ON BUILDING A MEDIA BUDGET THAT ACCOUNTS FOR BOTH LEAD GENERATION AND BRAND-BUILDING NEEDS?**

Jeremy highlighted two key points for budgeting media:

**1. Watch competitor activity.** If nearby communities are increasing their ad presence, especially on high-reach channels like radio, you'll need to respond—either by spending more, shifting your message, or using different media to stay top of mind.

**2. Match media to sales capacity.** If your sales team can't keep up with lead volume, consider pacing your campaigns. Running bursts around key moments—like holidays when care needs become more obvious—can help manage lead flow and make the most of your budget.

## **WITH AI SUMMARIES LIKE GOOGLE'S GEMINI NOW APPEARING AT THE TOP OF SEARCH RESULTS, HOW SHOULD MARKETERS ADAPT THEIR DIGITAL STRATEGIES AS CONSUMER SEARCH BEHAVIOR SHIFTS?**

Jeremy noted that no one has truly “cracked the code” on search. Google keeps its algorithm tightly guarded. With AI tools like Gemini now summarizing content at the top of search results, click volume is noticeably dropping. But this isn't accidental, Google is shifting strategy.

Rather than focusing solely on traditional search ads, Google is steering advertisers toward its broader ecosystem like display, shopping links, and other ad products powered by user data. The takeaway? Marketers should diversify their digital spend and explore Google's full range of ad options, not just rely on keyword-based search.