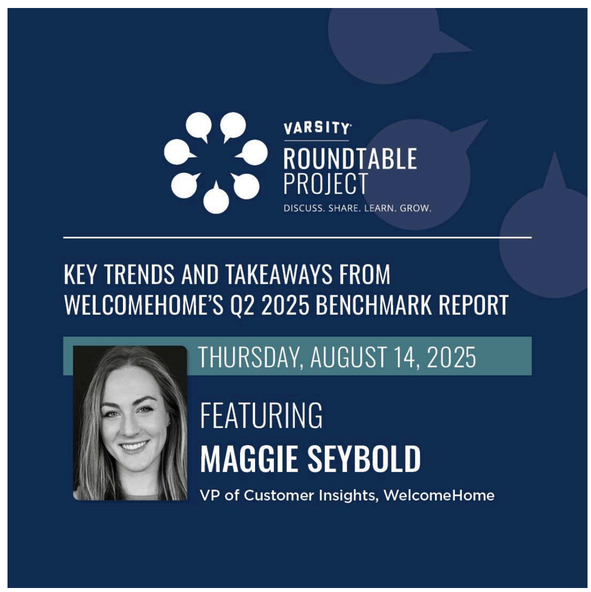
SALES AND MARKETING ROUNDTABLE #270
Key Trends and Takeaways from WelcomeHome's Q2 2025 Benchmark Report with Maggie Seybold

Thank you to everyone who attended our latest Sales and Marketing Roundtable! 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 welcomed Maggie Seybold from WelcomeHome. Maggie shared insights and lessons from WelcomeHome's latest Benchmark Report.



Maggie discussed trends, data and strategies that are shaping the senior living industry right now. From occupancy rates and lead conversion benchmarks to the most effective sales and marketing tactics, she provided actionable, data-driven takeaways you can put to work immediately in your own community.

"Fifty percent of families never hear from an executive director post-tour. This is a competitive opportunity just waiting to be seized." (Maggie Seybold)

FRESH PERSPECTIVES

- **QUALITY LEADS OUTPERFORM HIGH VOLUME** – Non-professional referrals may make up less than 5% of leads, but they convert at far higher rates and generate longer stays, delivering stronger ROI than aggregator or online sources. Focusing on lead quality over quantity can pay off in long-term resident value.
- **EXECUTIVE DIRECTOR FOLLOW-UP ACCELERATES SALES** – A brief, personalized ED call post-tour—often just three to four minutes—can shorten the sales cycle by 60%. This simple touch builds trust, boosts move-in likelihood, and sets a community apart from competitors.
- **TIMING IS CRUCIAL FOR POST-TOUR CONTACT** – Following up within one business day increases move-in likelihood by 42%, while two days yields a 27% lift. Each day beyond that erodes prospect engagement, underscoring the need for speed without sacrificing call quality.
- **VIDEO MESSAGES CAN PERSONALIZE AT SCALE** – Tools like OneDay allow EDs or CEOs to send personalized videos when a live call isn't possible. Including the prospect's name and visit details keeps the outreach authentic and impactful.
- **ADAPTING ENGAGEMENT ROLES WHEN NO ED IS PRESENT** – In the absence of an executive director, resident ambassadors can step in to provide a relatable, first-hand perspective of community life—similar to a college tour guide—enhancing trust and connection with prospects.

LINKS & CONTACT INFO

Maggie Seybold (Linkedin)
WelcomeHome (website)
Download the Q2 2025 Benchmark Report (here)

COMING UP ON VARSITY'S ROUNDTABLE!

Please join our next Roundtable gathering on Thursday, August 21 at noon ET, 11 a.m. CT and 9 a.m. PT. We'll be joined by Bob Kramer, co-founder of the National Investment Center for Seniors Housing & Care (NIC) and the founder of Nexus Insights. He will share his perspectives on the field of aging services.

NEW ON VARSITY'S PODCAST, ROUNDTABLE TALK

On our newest episode of Varsity's Roundtable Talk, we're joined by Laurie Orlov, a leading expert in aging and technology.

As the founder of Aging and Health Technology Watch, Laurie leverages her extensive experience in IT and personal caregiving challenges to offer insights into how technological innovations can enhance the lives of older adults.

Check it out on the Roundtable Talk page of the Varsity website!

All Industry

Q2 at a Glance

WelcomeHome's Industry Benchmarking is based on thousands of communities in 50 states across primary, secondary and tertiary markets. **For more detailed data, including state-level or pricing benchmarks, please connect with our WelcomeHome Customer Insights team: maggie.seybold@welcomehomesoftware.com.**

June occupancy hit 84%, marking a shift to steady growth. We've moved past the post-COVID bounce and into a new normal where growth depends on doing the basics well, not riding recovery momentum. As the market settles, year-over-year gains are naturally flattening.

Aggregator volume declines while conversion struggles persist. Aggregators are 35% of inquiries but convert only 4% to move-ins, with their share of total inquiries dropping from last year. Operators are shifting to sources like updated websites and paid digital search.

Professional referrals are growing, but it's important to expand beyond medical partners. While referral volume is up, Length of Stay declines as specialty medical partners send higher acuity residents. Communities find success by cultivating trusted local voices like faith leaders, librarians, and neighborhood staff who can identify families earlier in their search.

Data Drop: Executive Director follow-up transforms tours into move-ins, but most communities miss the moment. When EDs reach out after a tour, families proceed with greater confidence and speed. Yet half of families never hear from leadership post-tour, and only 25% of communities track this trust-building activity.

Our quarterly data highlights consistent occupancy rates around 83-84%, with the most growth at the industry's extremes, while the middle remains stable.

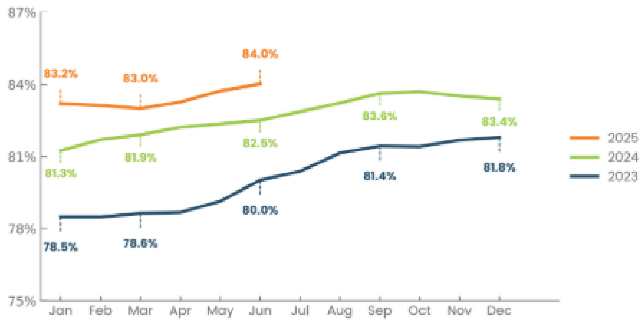
There's a notable decrease in reliance on aggregators, dropping from 45% to 35% of leads, shifting towards online and referrals. Enhanced focus on professional referrals, such as from medical and civic organizations, shows promise with quicker sales cycles and higher conversions, though heavy reliance on medical sources may affect ROI.

Additionally, a brief follow-up call by executive directors post-tour significantly boosts move-in likelihood, emphasizing the value of strategic engagement despite their busy schedules.

All Industry

Occupancy

INDUSTRY OCCUPANCY OVER TIME



JUNE INDUSTRY OCCUPANCY PERCENTILES

90th	98%
75th	95%
50th	88%
25th	76%
10th	64%

WelcomeHome industry benchmark data does not include lease-up communities. Occupancy percentiles are based on end-of-month performance.

Key Takeaways

- Occupancy has held steady across the industry, but the gap between the top 25% (95% and above) and the bottom 25% (mid-70s) shows that strong performance is still very achievable with the right strategies in place.
- The larger gains we saw after COVID are slowing down. This means future growth will depend less on the market bouncing back and more on how well teams perform.

Best Practices

- **Get back to basics: refocus marketing and sales teams on quality follow-up.** Rather than driving more inquiries, concentrate on making the most of existing leads. Prioritize tour to move-in strategies, personalized follow-up, and ED engagement throughout the funnel.
- **Keep the back door closed: Proactively identify and support at-risk residents.** Use WelcomeHome to flag early signs of dissatisfaction, care changes, or family concerns.

When examining occupancy rates, we noticed stability around 84% from September to July, with a slight rise to 84.5% in June and July. The data showed a stark contrast in performance: the top 10% of communities achieved 98% occupancy or higher, while the bottom 10% were at 64% or lower. This analysis excludes newly leased communities, focusing on those active for over 18 months. Growth is predominantly in the bottom and top quartiles, with both showing a 1.5-point gain from June to July, whereas the median remained unchanged.

Operators are now crafting targeted strategies for these performance extremes. For lower performers, there's a concentrated push on lead generation and top-of-the-funnel metrics like speed to lead and tour planning. For communities exceeding 95% occupancy, there’s a shift towards ROI-focused lead sources, emphasizing long-term resident potential and strategic sales director involvement rather than sheer volume management. Maggie is curious if others have experienced similar strategic differentiations in their operations.

All Industry

Sales Funnel Performance

INDUSTRY SALES FUNNEL PERFORMANCE

Activities	Q1 '25 Avg	Apr	May	June	Q2 '25 Avg	Q2 '24 Avg
New Inquiries	41	39	38	37	38	37
Connections*	31	29	29	27	28	-
Initial Tours	11.3	11.2	10.9	10.5	10.9	10.1
Retours	3.4	3.5	3.3	3.2	3.3	3.2
Move-ins	3.2	3.4	3.5	3.2	3.4	3.2
Move-outs	3.2	3.0	3.1	2.9	3.0	2.9

Note: Sales funnel metrics and conversions are monthly averages and are normalized to represent volume per 100 units per month.

***New tracking of "connections" provides deeper insight into how teams are working the funnel. A lead isn't a lead unless there's a real touchpoint—so connections are a key indicator of sales performance.**

Key Takeaways

- **Timely outreach is where momentum is won or lost.** Communities received an average of **38 new inquiries per 100 units,** but only **28 of those turned into meaningful connections.**
- **Teams are navigating high lead volume with limited bandwidth.** Many operators noted that sales directors are managing a high volume of leads, often without full context or qualification.

Best Practices

- **The first conversation sets the tone for everything that follows.** Your connection rate of 75% means 1 in 4 prospects are not receiving that personal outreach, so use WelcomeHome to review missed connections and start the conversation.
- **Do your best to make a connection with all prospects within 48 hours;** the best teams are able to reach out within 20 minutes, and tour conversions are highest when the first touchpoint is a call.

We're analyzing the sales funnel from initial inquiry to move-out, focusing on key metrics such as new inquiries, connections, tours, move-ins, and move-outs. A crucial element right now is the connection rate. Compared to last year, lead volume is lower, making it vital to capitalize on every contact opportunity and avoid letting leads stagnate.

The goal is to achieve an 80% connection rate to enable thorough discovery, personalized tours, and effective follow-up by executive directors. While current rates hover between 70% to 75%, higher connection rates can significantly enhance the prospect's journey through the sales funnel.

Additionally, retours have risen from 3.2 to 3.3 per 100 units over a year, with independent living showing the most notable increase. Prospects are seeking multiple visits or involving more decision-makers before committing, indicating a growing desire for repeated engagement in the decision process.

All Industry

Conversions

INDUSTRY CONVERSION PERFORMANCE

Conversions	Q1 '25 Avg	Apr	May	June	Q2 '25 Avg	Q2 '24 Avg
Inquiry to Connection	75%	75%	76%	73%	75%	-
Inquiry to Tour	28%	29%	29%	28%	29%	27%
Tour to Move-in	28%	31%	32%	31%	31%	31%
Inquiry to Move-in	8.0%	8.9%	9.2%	8.7%	8.9%	8.6%

Conversions are calculated as 'true conversion', using number of new inquiries, initial tours, and stage advance move-ins that occur in a month. Inquiries, tours and move-ins are not necessarily tied to the same prospect.

Key Takeaways

- **Top of the funnel engagement is driving more qualified tours.** With **29% of inquiries converting to tours,** teams are asking better discovery questions and improving how they filter leads.
- **Operators find tour to move-ins as the hardest part of the funnel.** Conversion held at 31%, but many teams are looking for tactics like ED follow-up and retours to improve close rates.

Best Practices

- **Refine discovery questions to qualify early and build trust.** Use WelcomeHome to review notes from inquiry calls and web leads. What are prospects telling you about timing, urgency, and care needs?
- **Personalize every tour before it starts.** Create a short pre-tour workflow that includes an intro from a team member, a highlight reel of the community, or a quick survey about the family's priorities. These small touches make the tour feel personal and increase emotional investment.
- **Track activities by Sales Director to guide coaching.** Use the Sales Activity Summary report to break down activities across the funnel by team member.

Currently, about 75% of prospects who inquire are successfully connected with, though there's a desire to see this number higher. The goal is not to let high interest leads slip away due to contact issues or database overload. As prospects move down the funnel, approximately 30% progress from inquiry to tour, and similarly, 30% transition from tour to move-in, resulting in an overall conversion rate of 9% from inquiry to move-in.

These conversion benchmarks—30% for inquiry to tour and ideally 35% for tour to move-in—serve as targets across communities. However, it's crucial to evaluate individual community performance, especially in independent living and memory care, to strive for improvements aligned to these goals.

All Industry

Lead Source Analysis

2025 INDUSTRY YTD LEAD SOURCE KEY PERFORMANCE INDICATORS

	% of Total Inquiries	Change from '24	% of Total Move-ins	Inquiry to Tour	Tour to Move-in	Inquiry to Move-in	LOSC (median)	LOS (median)
ADVERTISING	2%	—	2%	35%	22%	8%	86	728
AGGREGATOR	35%	∨	16%	17%	23%	4%	35	322
CALL/DRIVE-BY	6%	—	14%	63%	34%	21%	29	356
LOCAL AGENCY	3%	—	7%	56%	37%	20%	17	248
ONLINE	43%	∧	29%	23%	25%	6%	38	323
REFERRAL (Non-professional)	3%	—	10%	73%	41%	30%	31	457
REFERRAL (Professional)	4%	∧	13%	59%	45%	27%	15	319

Key Takeaways

- **Online sources are growing in both volume and influence.** Online leads accounted for **43% of inquiries and 29% of move-ins** so far this year, making them the top driver by volume.
- **Aggregator volume is declining while conversion struggles persist.** Aggregators made up **35% of inquiries** but just **16% of move-ins,** with an inquiry to move-in rate of only **4%.**
- **Referral networks should be evolving beyond traditional medical sources.** While professional referrals grow, communities see shorter stays as specialty partners refer higher acuity residents.

Best Practices

Tap into trusted voices in the community.

- Pastors, librarians, community organizers, and local staff often know when someone quietly begins the search for senior living, and when they understand what your community offers, their warm, personal referrals can make all the difference.

Make every online inquiry feel like a personal invitation

- People reaching out online are actively comparing you with a few other communities. They are not just asking for information—they are looking for signs of warmth, attentiveness, and trust.

Lead sources are shifting, with aggregators and online channels now driving the majority of inquiries—35% and 43% respectively—while traditional methods and referrals make up the rest. But here's the twist: the highest-quality leads aren't the most common.

Non-professional referrals account for less than 5% of total leads, yet 73% of them tour, and nearly half move in. They also tend to stay longer, delivering stronger ROI. That's why more operators are focusing on quality over quantity, looking closely at conversion rates, sales cycle length, and length of stay to drive smarter growth.

Geographic Analysis

Urban vs. Rural Analysis

Q2 2025 URBAN VS. RURAL KEY PERFORMANCE INDICATORS

	Rural	Urban
June '25 Occupancy	83.9%	84.0%
Occupancy Gain since Jan '25	1.6 pt	0.8 pt
New Inquiries	22	39
Connections	16	29
Tours	7.5	11.1
Retours	2.9	3.4
Move-ins	3.5	3.4
Move-outs	2.9	3.0
Inquiry to Connection	71%	75%
Inquiry to Tour	33%	28%
Tour to Move-in	46%	30%
Inquiry to Move-in	15.5%	8.6%

Rural-Urban Commuting Area (RUCA) codes classify census tracts based on population density, urbanization, and commuting patterns. Urban areas have higher population density and strong ties to metropolitan centers. Rural areas reflect lower density and weaker metropolitan commuting links.

Sales funnel metrics and conversions are monthly averages and are normalized to represent volume per 100 units per month.

Key Takeaways

- Rural engagement **is strengthening at the top of the funnel.** Rural teams improved their inquiry to connection rates compared to Q1 and are successfully converting more inquiries into tours.
- Urban volume **advantage meets persistent conversion struggles.** Urban teams continue generating higher inquiry and tour volumes but face ongoing challenges with conversion, especially from tour to move-in.

Best Practices

- **Leverage rural's natural trust-building advantage during tours.** Rural prospects often rely on word of mouth and local reputation. Use this during tours by sharing resident stories, highlighting staff longevity, and connecting prospects with current families.
- **Use automation strategically based on market dynamics.** Urban markets need automated speed by setting up quick responses and follow-up sequences. The first strong touchpoint often determines who gets the tour.

The data shows big differences between urban and rural markets—some communities are in highly competitive areas, while others have no competitor within 20 miles. That context shapes the entire sales approach.

On the care type side, year-over-year trends vary widely, with memory care and blended memory care communities facing particular challenges in managing moveouts. In these higher-acuity settings, staying ahead of "the back door" is critical, though often difficult, making it essential for operators with multiple product lines to keep a close eye on these patterns.

Getting executive directors actively involved in sales can be a game-changer. When prospects meet the person who will oversee their day-to-day experience and that leader takes the time to connect it builds trust, confidence, and excitement about joining the community. Yet only about half of families ever hear from an ED post-tour.

The time investment is minimal—just three to four minutes on average—but the payoff is huge, leading to a 60% shorter sales cycle. For communities that make ED follow-up a priority, it's not only a better sales experience, it's a clear competitive advantage.

The Power of Executive Director Follow-Up

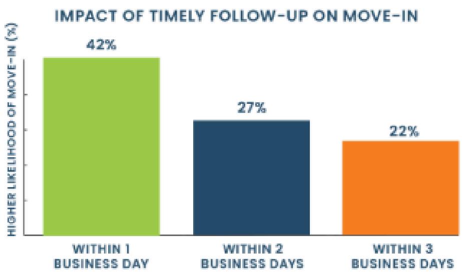
The Power of Timing

There's meaningful variation in how quickly EDs follow up after a tour. To explore this, we looked at **how many business days it takes EDs to reach out and how times vary across communities.**

ED FOLLOW-UP TIME BY PERCENTILE *(EXCLUDES WEEKENDS)*

75th Percentile	1 Business Day
Median	2 Business Days
25th Percentile	4+ Business Days

WHY FOLLOW-UP TIMING MATTERS



Following up with prospects sooner directly improves move-in rates. Compared to follow-up that happens after more than 3 business days, **faster response times lead to better move-in conversion results.**

Key Takeaways

- **Speed signals priority.** When you follow up quickly, families feel valued and see it as a preview of how responsive you'll be as a care partner.
- **Top performers act within 24 hours.** The fastest 25% of EDs reach out within 1 business day, making speed a competitive advantage.

Best Practices

- **Act within the 3-Day Window:** Families leave tours emotionally engaged, but that connection fades quickly.

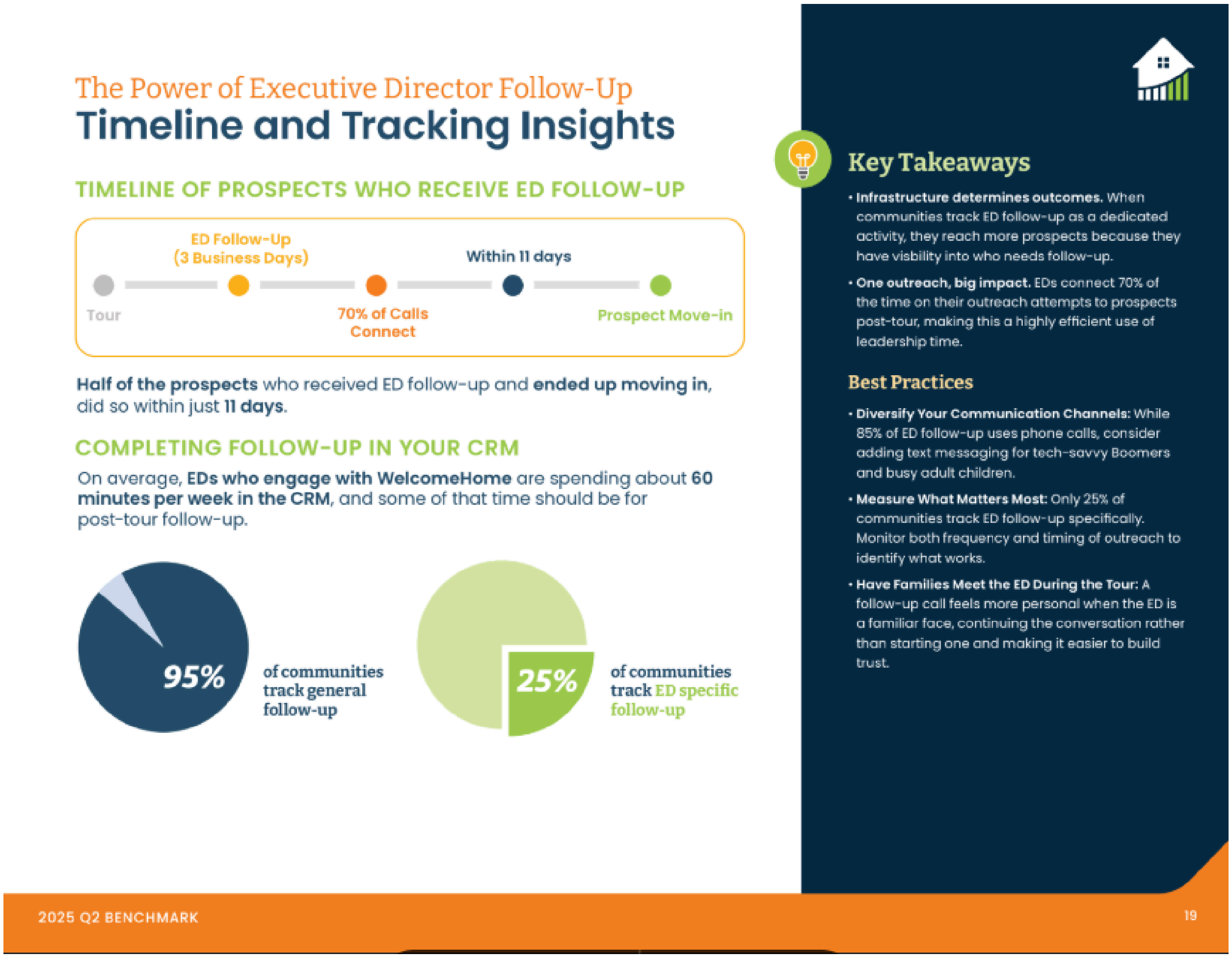
Follow up within 3 business days

+ 1.4x more likely to move in
+ 20+% faster move-ins

- **Create Automatic Timing Triggers:** Utilize WelcomeHome to prompt ED follow-up within 24 hours of tours. Automated reminders help you reach families while the tour experience is still fresh and momentum is high.

The timing of executive director follow-up matters almost as much as the follow-up itself. Data shows the top performers reach out within one business day of a tour—boosting move-in likelihood by 42% compared to slower responses. Even a two-business-day window still increases the chance by 27%, but beyond that, the impact drops sharply.

While speed signals attentiveness, it should be balanced with quality—sometimes taking a day to align with the sales director can make the conversation more impactful. The key is acting quickly enough to keep the prospect's attention while delivering a meaningful, trust-building interaction.



Phone tag is less of a barrier when executive directors are engaged—especially if they were part of the tour. In those cases, 70% of their calls are answered on the first try, and the best teams set expectations by letting prospects know the call is coming.

The payoff is big: half of prospects who take that call move in within 11 days, a far faster turnaround than average. Plus, the time commitment for EDs is minimal—about 60 minutes a week in the CRM, or under 10 minutes a day—making it a small investment with a major impact on sales outcomes.

The Power of Executive Director Follow-Up

Summary: Best Practices That Work!

Make ED Follow-Up A Required WelcomeHome Post-Tour Activity

Communities that track ED follow-up as a dedicated WelcomeHome activity reach 50% of prospects. When it's built into your CRM as a clear, trackable step, it becomes routine. The rule is simple: if it's trackable, it's repeatable.

Follow Up Within 3 Business Days

Families often leave tours feeling emotionally connected, but that connection fades quickly if it isn't nurtured. Follow-up within **3 business days** leads to **20+% faster move-ins** and a **1.4x higher likelihood** of moving in. The longer you wait, the harder it becomes to recapture that first impression.

One Outreach Is Usually Enough

EDs typically connect on the **first attempt** and successfully connect **70% of the time.** The key is making that one outreach count by referencing something personal from the tour: their concerns about medication management, their excitement about family dinners, or their mother's love of gardening.

Match Your Communication Method To The Family

Not every family wants a phone call. Some adult children are juggling work calls all day and would rather respond to a text. Others prefer hearing your voice. **Use WelcomeHome prospect notes to guide your approach based on communication preferences you discovered during the tour.**

Set Up Automated Reminders

Configure WelcomeHome to automatically prompt ED follow-up within 24 hours of high-intent tours. Use these prompts to reach out while interest is high and families are still processing their tour experience. This system ensures no prospects fall through the cracks.

To make executive director follow-up a consistent part of the sales process, start by making it a required, separately tracked activity in your CRM—distinct from general or creative follow-up. Aim for contact within three business days, but ensure the call is tailored and informed by solid discovery.

Respect communication preferences by using CRM pulse surveys to determine if prospects prefer phone, text, or another method. Setting expectations for the call and leveraging automation—like email alerts—can help EDs stay on track without adding heavy CRM time. The result: more efficient touchpoints and higher engagement rates.

QUESTIONS

WHAT DO YOU ATTRIBUTE THE DIFFERENCE IN THE LENGTH OF STAY BEING MUCH LESS FOR THE LOCAL AGENCY AND THE AGGREGATORS?

Often, leads from local agencies and aggregators come in during high-urgency situations, where the priority is securing a quick move-in rather than ensuring the perfect fit. Sales teams can get competitive in these scenarios, focusing on closing the deal even if the match isn't ideal.

That can lead to shorter stays, especially when residents quickly realize they need a different care level. Clear communication with agency and aggregator partners about what a community offers and who it serves best can help reduce this mismatch and improve long-term retention.

ARE MOST MEMORY CARE MOVEOUTS HAPPENING DUE TO RESIDENT DEATHS, OR ARE OTHER FACTORS DRIVING THE TURNOVER?

Across the board, families are waiting longer to move loved ones into memory care, which often shortens their overall stay due to advanced health needs by the time they arrive. From a marketing standpoint, the focus needs to be on reaching prospects earlier in their journey—when intervention can have a greater impact and length of stay isn't compressed by late-stage health challenges.

DO YOU HAVE ANY STATISTICS ON HOW MARKETING AUTOMATION—SUCH AS DRIP CAMPAIGNS—CAN ACCELERATE THE SALES PROCESS OR IMPROVE TIMING TO MOVE PROSPECTS ALONG?

While this report doesn't cover marketing automation specifically, we've seen that when it's used strategically, it can significantly improve early-stage results—especially the connection-to-tour conversion.

Automation gives sales directors insight into a prospect's interests before the first call, allowing them to tailor the conversation right away. For example, if a prospect has engaged with an assisted living brochure, a pricing worksheet, and an event schedule, the sales director knows to focus on assisted living, address potential cost concerns, and highlight community engagement. That targeted approach builds rapport faster and drives higher conversion rates to tours.

FOR ANYONE ON THE CALL, HOW DO YOU FEEL ABOUT HAVING YOUR EXECUTIVE DIRECTOR, CEO, OR OTHER SENIOR LEADER FOLLOW UP WITH PROSPECTS?

ATTENDEE: From personal experience touring assisted living communities for my father about 18 months ago, the executive director who stepped in to help was outstanding—and ultimately the reason I chose that community. So, if you have a great executive director, absolutely involve them.

ATTENDEE: In mystery shopping experiences, I've had executive directors follow up the day after a tour—sometimes by email if we didn't meet in person—thanking me for visiting and offering further assistance. I've also received video messages from EDs after a visit, which felt unique and personal. While we often focus on calls, email and video follow-ups can be powerful alternatives that stand out.

MAGGIE: Any personalized follow-up is valuable—especially when it acknowledges missing each other during the tour, introduces the ED by name, expresses excitement about the visit, and offers ongoing support. Video messages are a great tool for this, and we've seen them used successfully to build connection and keep prospects engaged.

AFTER THE ED MAKES A CALL, WHEN SHOULD THE SALES REP FOLLOW UP? AND IF THE ED LEAVES A MESSAGE BUT DOESN'T GET A CALL BACK, WHAT'S THE NEXT STEP?

It can vary by sales process, but best practice is to introduce the executive director during the tour—either by stopping by their office or meeting them along the route—so there's already a connection.

The ED should then follow up within two days. If they can't connect on the first try, a quick text saying who they are and offering to call again in a day or two often works well. From there, the sales director usually takes the lead on the post-tour journey, maintaining momentum and guiding the prospect through to move-in.

IF AN ED OR CEO DOESN'T HAVE TIME FOR A LIVE FOLLOW-UP CALL, IS IT ACCEPTABLE TO USE A PERSONALIZED METHOD—SUCH AS A ONEDAY VIDEO MESSAGE—TO SHOW THEY CARE, EVEN THOUGH AN ACTUAL CONVERSATION IS ALWAYS BEST?

OneDay is a great option—and so are other quality video tools—because video engagement lets prospects see your face, your smile, and your sincerity, which can have a big impact. The key is keeping it personal: avoid reusing the same video, and include the prospect's name and details relevant to their visit. That level of personalization may take as much time as a call, but whether it’s through video or another channel, the goal is simply to get in front of the prospect in a meaningful way.

IS THE BENCHMARK DATA BROKEN OUT BY COMMUNITY TYPE, SUCH AS LIFE PLAN, RENTAL, ASSISTED LIVING, OR MEMORY CARE?

Yes, current reports focus on rental model communities, including independent living, assisted living, memory care, and blended types. They don’t yet include CCRCs or entrance fee communities, but those benchmark reports are in development for next year.

FOR COMMUNITIES WITHOUT AN ED, WHO ELSE—OUTSIDE THE SALES TEAM—CAN ADD VALUE TO THE PROSPECT EXPERIENCE, AND HOW CAN THE BENCHMARK DATA HIGHLIGHT COMPETITIVE OPPORTUNITIES IF THIS FOLLOW-UP ISN’T BEING DONE?

If a community doesn’t have an ED—due to turnover, a vacancy, or another reason—a resident ambassador can be a strong alternative for adding value to the prospect experience. Like a college tour guide, they offer an authentic, first-hand perspective of community life that’s closer to the prospect’s future experience than a sales director might provide, helping create a more genuine and relatable connection.

CAN TEXT COMMUNICATIONS—SUCH AS BROADCAST TEXTS OR INDIVIDUAL MESSAGES—BE TRACKED WITHIN WELCOMEHOME, ALONGSIDE EMAIL AND MARKETING AUTOMATION INTEGRATIONS?

Yes, WelcomeHome supports both bulk and one-on-one text messaging. It can integrate with your existing phone number or provide an alias, and all messages appear in the CRM as well as on your phone.

IN WELCOMEHOME, CAN CALL TRACKING BE SET UP TO DISTINGUISH BETWEEN INBOUND AND OUTBOUND CALLS, OR DOES IT ONLY TRACK TOTAL CALLS?

Yes, that’s configurable in WelcomeHome. You can work with your CSM to label calls as specific activities, allowing you to track inbound and outbound separately instead of just total calls.