

**BIGBUZZ**<sup>®</sup>

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The Complete Data-Driven eBook:

# Team Alignment is the Secret to Achieving Higher Marketing Outcomes

Your organization has clearly documented mission, vision and values, a brand standard guide that lays out every way your communities are differentiated in the market and a marketing plan that was painstakingly created by the executive team with a corresponding annual budget.

Is your team following these compass stars? Or are folks going rogue despite best intentions?

Team misalignment is the number one offender when it comes to derailed marketing efforts and outcomes.

**To get everyone on the same page, organizations like yours share insights on these topics, which we will cover in detail in this eBook:**

Maximize Inputs and Outputs from Whole-Organization Sales and Marketing Meetings

Hone Additional Activities and Assets to Sharpen Team Alignment

Learn the most engaging types of social media posts in senior living

Achieve Higher Marketing Outcomes with Documented Processes

Get Senior Living Industry Benchmarking: 7 Best Practices in Team Alignment

Let's get started.

# OVERVIEW OF STUDY PARTICIPANTS

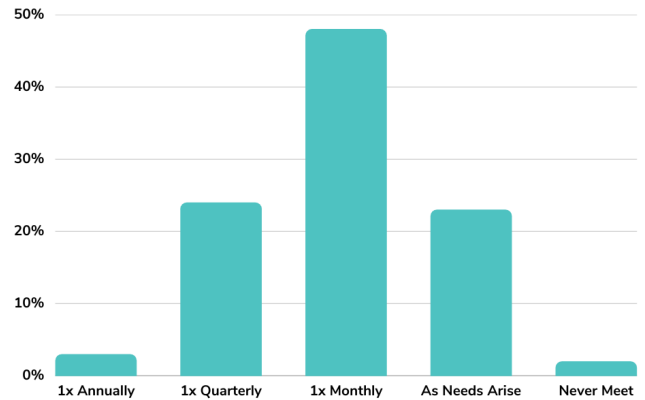
We surveyed more than a hundred senior living executives to uncover insights into how they achieve higher marketing outcomes through team alignment.

When asked how often the sales and marketing teams of your peers' entire organization meet, 3% of teams met once annually, 24% met once quarterly, 48% met once monthly, 23% met as needs arise and 2% indicated their marketing and sales team never meets together. In our experience, once quarterly is the sweet spot, and in this text we offer a framework for quarterly pulse meetings.

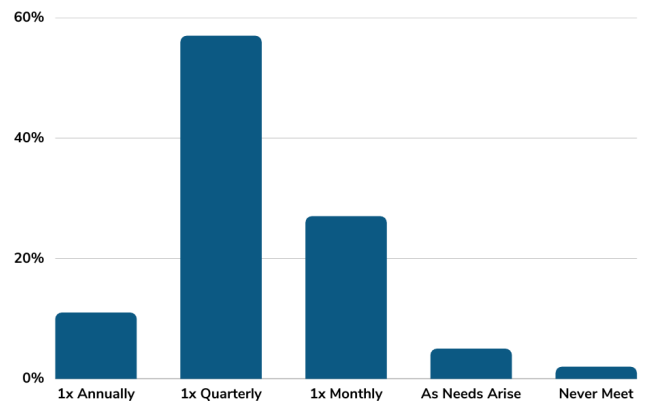
We also asked study participants how often the whole marketing and sales team reviewed the organizational mission, vision, and values and 11% of teams reviewed them once annually, 57% reviewed them once quarterly, 27% reviewed them once monthly and 5% reviewed them as needs arise. We went on to ask how often the entire marketing and sales team collectively reviewed the organizational brand standards, including positioning, differentiators and value proposition, and 14% of teams reviewed them once annually, 47% reviewed them once quarterly, 34% reviewed them once monthly and 5% reviewed them as needs arise. Both of these datapoints revealed quarterly as the majority answer, and we are in agreement with that frequency. The quarterly pulse meeting is a good time for 5-minute reviews of each.

In your peers' organizations, the responsibility for team alignment fell on various individuals, with 65% of respondents indicating that it is the role of C-Suite executive(s), 51% mentioning managing partner(s), 27% stating that the owner(s) are responsible and 22% noting the involvement of outside consultants. We find that internal stakeholders have the highest impact on team alignment by creating a culture of continuous improvement with a cadence of accountability. Outside consultants can be valuable when new knowledge, trends or benchmarking are needed to further amplify team alignment and marketing results.

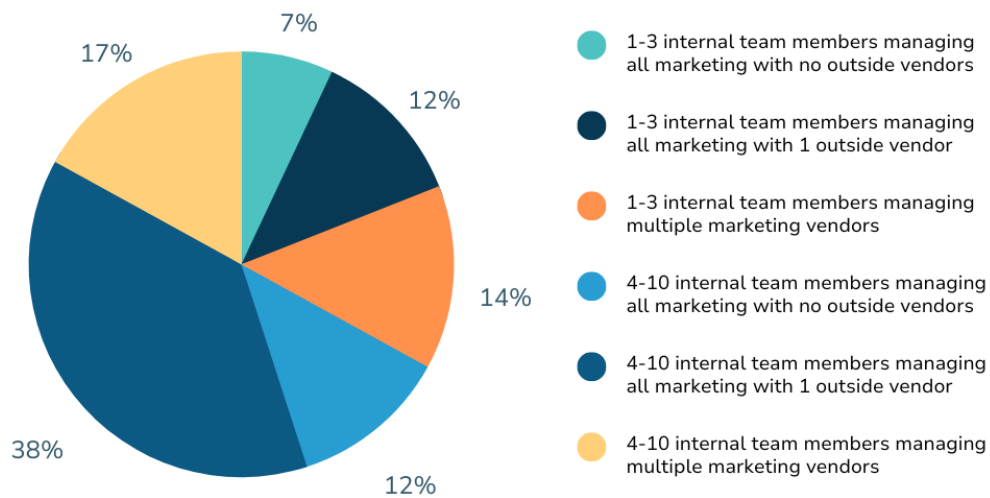
How Often the Sales and Marketing Teams of Your Peers' Entire Organization Meet



How Often the Whole Marketing and Sales Team Reviewed the Organizational Mission, Vision, and Values



## Which of the following best describes your organization's marketing team structure?



*Who participated in the study? Here's a breakdown of your peers who contributed.*

In adhering to brand standards, several factors can potentially derail your organization, as reported by our survey respondents: 22% of your peers attributed derailing to new ideas, 41% pointed out a lack of alignment on brand standards, 48% emphasized a lack of communication about brand standards, 55% mentioned a lack of data backing brand standards and 14% indicated their organization doesn't have brand standards. In adhering to the strategic marketing plan, there are several factors that can potentially derail your organization, as reported by respondents: 24% of respondents attributed derailing to new initiatives, 46% pointed out a lack of alignment on the marketing plan, 54% emphasized a lack of communication about the marketing plan, 44% mentioned a lack of data backing the marketing plan and 16% indicated their organization doesn't have a strategic marketing plan. Team alignment can support in keeping marketing efforts on track. In this text, we will also explore best practices for achieving team alignment over the long term.

Some survey respondents indicated their organization's marketing budget can sometimes be reallocated to other capital needs as they arise. Among respondents, 58% mentioned to operational expenses, 44% to rechanneling to growth by acquisition or merger 54% to clinical/care expenses and 41% cited financial needs or budget cuts as potential areas for reallocation. Again, team alignment can help keep budget allotted to marketing efforts that produce revenue and profit.

A majority, 93%, of respondents said they needed input from others before investing marketing budget, which begets the need for systematic team alignment. Of your peers who participated in the study, 57% mentioned managing partner(s), 51% said investor(s), 48% cited the board of directors and 44% indicated the need for input from C-Suite executive(s). Input was required with some frequency, with 52%, or the majority of respondents, mentioning once quarterly. This is why we provide a framework for the quarterly pulse meeting next.

# MAXIMIZE INPUTS AND OUTPUTS FROM WHOLE-ORGANIZATION SALES AND MARKETING MEETINGS

To keep momentum and consistency, we suggest a quarterly pulse of regular whole-organization sales and marketing meetings. Having a One-Page Strategic Marketing Plan on hand, similar to the example below, can help frame the conversation and give way to actionable outcomes. The BIG, or Big Important Goal, at the top as well as the Objectives in the left column stay the same for the year and the Strategies and Measures are refreshed each quarter dynamically as the bulk of the meeting agenda.

**BIG: We will increase awareness to increase revenue from \$X million to \$Y million by December 31, 2023.**

| Objectives   | Strategies   | Measures   |
|--|--|--|
| 1. We are the preferred holistic Christian senior care provider in the Puget Sound region. | <ul style="list-style-type: none"> <li>• Conduct voice-of-the-customer (VOC) surveys</li> <li>• Use survey data to develop key messaging, visuals and direction</li> <li>• Apply differentiating messaging consistently across all marketing channels</li> </ul>   | Increase occupancy from 86% to 99% by 2025                 |
| 2. We are the trusted authority on investing in senior care.                               | <ul style="list-style-type: none"> <li>• Evolve sales messaging</li> <li>• Build and deploy a social media strategy</li> <li>• Refine and evolve the content marketing strategy</li> <li>• Launch public relations, awards campaigns and review program</li> </ul> | Increase buy-in rate from 20% to 50% by 2025               |
| 3. We have strong internal sales and marketing systems to support sustainable growth.      | <ul style="list-style-type: none"> <li>• Process map internal sales and marketing processes</li> <li>• Apply the functional marketing team model</li> <li>• Automate content marketing campaigns</li> </ul>  | Increase monthly SQLs from 145 to 230 by December 31, 2023 |

## Key Themes in Whole-Organization Sales and Marketing Meetings

In our study, three popular themes emerged when we asked what survey respondents cover in whole-organization sales and marketing meetings. For each, actionable agenda items are offered to support your team in driving sales and marketing success in your senior living communities through all-hands meetings.

### Theme 1: Strategic Planning and Market Analysis

In our study, your peers saw all-hands meetings as good opportunities to discuss the company's overarching sales and marketing strategy as related to executive fiscal and operational goals. They typically used this time to touch base on target markets, competitors, positioning, brand, differentiation, resident/family needs and marketing performance. By analyzing market trends and conducting comprehensive competitor research together with the broader team, they said they can more readily identify opportunities for growth and accordingly adapt strategies. Your peers emphasized the importance of setting clear short-term and long-term goals in these sessions, aligning each with overall business objectives.

Actionable insights in strategic planning and market analysis that survey respondents said they cover in all-team meetings include:

1. Review market trend analyses to identify emerging opportunities and potential threats.
2. Cover any emerging competitor research to launch new strategies to stay on the competitive edge.
3. Review with the whole team brand positioning every time to keep it top of mind – it's only differentiating if the frontline employees are regularly and consistently sharing it.
4. Continuously refine and adapt sales and marketing strategies based on market dynamics.



“During our whole-organization sales and marketing meetings, we dedicate considerable time to discussing and refining our strategy. We delve into market trends, emerging technologies and new marketing methods to ensure that we remain at the forefront of the industry. By aligning our goals with our sales and marketing activities, we can effectively navigate the ever-evolving market landscape and maintain our competitive edge.”

– Q3 2023 survey respondent

## Theme 2: Sales Performance Evaluation and Training

Respondents to our study said all-team meetings are also a good time to measure and evaluate sales performance to identify areas for improvement and drive growth. Agenda items cited included sales performance metrics, targets and incentives. Your peers track key performance indicators (KPIs) and conduct regular performance reviews to identify top performers, provide recognition and offer targeted training and development opportunities. Survey respondents also see these meetings as an ideal platform to share success stories, best practices and sales techniques to inspire and motivate the sales team.

Actionable insights in sales performance evaluation and training that your peers said they cover in all-team meetings include:

1. Establish clear sales targets and incentives that align with organizational objectives.
2. Regularly evaluate and track sales performance using relevant metrics, such as lead conversion rates and revenue generation.
3. Provide ongoing training and professional development opportunities to enhance the skills and knowledge of the sales team.
4. Foster a culture of recognition and celebrate sales successes to boost morale and motivation.



“At the heart of our organization’s success lies our dedicated sales team. To support their growth and enhance their effectiveness, we prioritize providing comprehensive training and development opportunities. During our meetings, we focus on evaluating sales performance, setting ambitious but attainable targets and incentivizing our sales team. We inspire our sales staff and equip them with the necessary skills and knowledge to excel in their roles. It’s more than a meeting; it’s a time to motivate our team to achieve exceptional results.”

– Q3 2023 survey respondent

### Theme 3: Innovation and Adaptability

In a rapidly evolving and expanding senior living landscape, you and your peers know embracing innovation and adaptability is critical for success. Our survey respondents said all-hands sales and marketing meetings should address topics such as new product launches, technological advancements and market opportunities. They encourage discussions on exploring new markets, leveraging emerging marketing channels and incorporating innovative strategies to effectively reach and engage target potential residents and family members. The all-hands meeting is a good time to foster a culture that embraces change, encourages creativity and empowers team members to contribute new ideas and approaches.

Actionable insights in innovation and adaptability that your peers said they cover in all-team meetings include:

1. Share industry trends, technological advancements and emerging market segments
2. Encourage a culture of innovation and creativity by promoting idea sharing and experimentation in each meeting.
3. Explore how to further leverage marketing channels and strategies to effectively reach and engage target audiences.
4. Foster an environment that encourages adaptability and flexibility to respond to evolving customer needs and market dynamics.



“In our whole-team meetings, we carve out time to discuss our levels of care, including each one’s strengths and weaknesses and how we can close any known gaps. We explore how to bring various levels of care to market effectively, ensuring that we communicate the value proposition of each while also staying consistent with our overall brand positioning. This is how we enhance customer satisfaction, differentiate ourselves from competitors and expand our reach.”

– Q3 2023 survey respondent

# HONE ADDITIONAL ACTIVITIES AND ASSETS TO SHARPEN TEAM ALIGNMENT

In our study, we asked your participants in what other team alignment activities or assets their organization invests. Here are the top answers and an overview of each:

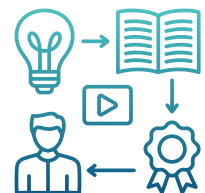
## Team Building Activities

One prevalent theme in the dataset was investing in team building activities to enhance cohesion and collaboration among team members. Your peers agreed that these activities foster trust, improve communication and strengthen relationships within the team. Examples of team building activities mentioned include outdoor adventures, workshops, social events and teamwork games. By engaging in these activities, organizations like yours strive to create a positive and supportive team culture that promotes effective teamwork and productivity.



## Training and Development

Investing in the professional development of employees was another popular answer in the dataset. Companies like yours recognize the importance of equipping their teams with the necessary skills and knowledge to perform their roles effectively. Leadership training, communication skills training and skills enhancement programs were mentioned as common investment areas. By providing training and development opportunities, organizations aim to improve team performance, foster growth and create a learning-oriented environment.



## Review Market Research

Many responses highlight investments in gathering the team to review market research to gain insights into customer needs, market trends and industry dynamics. Market research enables organizations like yours to make informed decisions, identify growth opportunities and develop effective marketing strategies. By understanding their target audience and market landscape, you can align services and marketing efforts accordingly, ultimately leading to improved outcomes.



While the all-hands quarterly meeting is a good time to cover a variety of topics, focus and actionability are key. To effectively prioritize agenda items, use the One-Page Strategic Marketing Plan format outlined earlier in this eBook, refreshing all Strategies and Measures therein every quarter.



# ACHIEVE HIGHER MARKETING OUTCOMES WITH DOCUMENTED PROCESSES

The team remains aligned when its marketing efforts are made cohesive with documented processes. In our study, your peers indicated they document the following such processes to further bolster team alignment and marketing outcomes:



## Standard Operating Procedures (SOPs)

Participating organizations placed significant importance on following standard operating procedures to ensure consistency, efficiency and compliance in marketing. SOPs provide step-by-step instructions for performing specific tasks or processes, covering various areas such as financial management as related to marketing, project management and care management in correspondence with brand standards. By adhering to SOPs, senior living organizations like yours aim to maintain quality standards in both how they communicate about and deliver care – both of which are directly related to bolstering overall marketing outcomes.



## Quality Management System (QMS)

The dataset indicated that senior living organizations like yours prioritize the implementation of quality management systems. QMS involves the development of a comprehensive framework that covers areas such as quality assurance, quality control, risk management and continuous improvement. By following QMS procedures, organizations aim to ensure consistent service quality, resident satisfaction as well as adherence to industry standards and regulations – all of which are directly related to maximizing brand amplification outcomes.



## Environmental Management System (EMS)

Environmental management systems were highlighted as another area of focus for senior living organizations in the study. These systems incorporate processes and procedures designed to minimize the environmental impact of their operations. They encompass compliance with data protection legislation, adherence to environmental management system standards and the development of environmental plans. By following EMS procedures, organizations strive to promote sustainability, reduce their carbon footprint and ensure environmentally responsible practices – all strong differentiators in today's highly competitive senior living market. Which of these processes does your organization have clearly documented? What could you add for additional team alignment?

Which of these processes does your organization have clearly documented? What could you add for additional team alignment?

# 7 BEST PRACTICES IN TEAM ALIGNMENT

Your peers identified in the study these seven best practices for team alignment:

1. Establish common values and culture. This ensures that all team members adhere to the same code of conduct and standards, fostering team cohesion and cooperation. At each quarterly session, have team members read aloud for the entire group your organizational mission, vision and values. Encourage folks to share about how another person on the team embodied the organizational values or culture. As [Alicia Marie of PeopleBiz, Inc.](#), says, "Culture is what you say, do and reward." Dust off the document and make it come to life with regular discussion.
2. Offer incentives and rewards. This can be done through team bonuses, recognition programs and promotion mechanisms. By providing tangible rewards for achieving team goals, organizations like yours can motivate and engage their employees. And remember, even a simple verbal acknowledgement in front of a high-performing team member and her coworkers can be received as a remarkable reward.
3. Establish effective communication channels. By developing independent communication software or platforms, organizations like yours can facilitate daily communication among team members, ensuring everyone stays informed and connected. [A favorite of ours is Slack.](#) Carry that same crystal clear into your meetings with the [L10 meeting format](#).
4. Encourage ongoing training and development. By providing necessary training programs and continuous learning opportunities, organizations like yours enable team members to acquire new skills, grow professionally and remain competitive in their respective fields.
5. Provide feedback and assessments. Gathering feedback and conducting assessments of the team's current state allows organizations like yours to identify areas for improvement and address any issues or challenges hindering team alignment. Regular feedback and assessment help foster continuous improvement and enhance team effectiveness. Initiating a voice-of-the-employee survey before your quarterly meeting will allow you to share data and trends that emerge from your study.

6. Clarify goals and expectations. It's crucial for organizations to ensure that all team members are aware of your organization's goals and expectations. This clarity helps align individual efforts with the larger organizational objectives, promoting a shared sense of purpose and direction.
  
7. Establish consistent rules and procedures. To maintain team alignment, organizations like yours establish consistent rules, policies and procedures. By ensuring that all employees understand and follow these guidelines, organizations can create a unified and efficient work environment. But don't spend too much time here – even 15 minutes of reminders about structures in your quarterly meeting can go a long way in promoting adherence to company policies.

These best practices, when implemented effectively, can significantly contribute to team alignment and enhance overall organizational performance. And we wish you all the best in achieving higher marketing outcomes by aligning your team!

*Big Buzz is a marketing agency delivering a steady stream of move-in-ready leads to teams serving the senior living industry. For more than 15 years, Big Buzz has helped senior living marketing and sales teams nurture leads to increase occupancy, grow and scale. CEO Wendy O'Donovan Phillips is the author of the book [Flourish!: The Method Used by Aging Services Organizations for the Ultimate Marketing Results](#), has been published in McKnight's, has been a regular contributor to Forbes, and has been quoted in The Washington Post, ABC News and Chicago Tribune. The Big Buzz leadership team regularly lectures in front of audiences ranging from 25 to 3,000 attendees, including at Argentum and various LeadingAge chapters. Agency awards and accolades include recognition for excellence by the American Marketing Association, Gold Key Award Winner by the Business Marketing Association, and Top Advertising and Marketing Agency by Clutch. [www.bigbuzzinc.com](http://www.bigbuzzinc.com)*

## Yes, I want to connect with a Big Buzz marketing expert today so I can get:

- ✔ Clarity on the root causes of current lead issues we face
- ✔ Research and industry intel that will help eradicate lead issues for good
- ✔ A clearer vision for reaching the organization's desired future state
- ✔ A free initial nurture marketing plan to invite warm leads to move in now

SCHEDULE MY FREE STRATEGY SESSION

No charge, no obligation, no sales pitch. Promise.

## 4 ways you can work with Big Buzz now:

|  |  |  |   |
|--|--|--|---|
| Consistently attract a steady stream of move-in-ready leads to all your communities by...  | Achieve consistently higher results in one area of marketing, such as brand amplification, content marketing, social media marketing or marketing collateral efforts by... | Swiftly identify the one sales or marketing issue killing your organization the fastest, get to its root cause and eradicate it for good for stronger overall results by...  | Immediately gauge at a low-risk price point how to achieve higher precision marketing results by... |
| Making Big Buzz, the experts in senior living marketing benchmarking, your full-service agency of record to oversee all marketing efforts. | Entrusting the development and full execution of one of these nurture marketing strategies to the senior living nurture marketing experts at Big Buzz.                     | Engaging Big Buzz to audit and suggest improvements to one area of your nurture marketing efforts, such as brand amplification, content marketing or social media marketing. | Handing off a single marketing project to Big Buzz.   |
| <a href="#">Contact us</a> for pricing   | Cost: Starts at \$15,000 per nurture strategy  | Cost: Starts at \$10,000 per audit   | Cost: Starts at \$5,000 per project   |