



# Loop Marketing: A Modern Approach for Senior Living

Building Lasting Relationships, Trust, and Advocacy Beyond Move-In



# Meet the Presenter: Melissa Smalley

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With more than 20 years of experience in the senior living industry, Melissa brings a rare blend of operational, clinical, and strategic expertise to her role. A former Licensed Nursing Home Administrator, she has led communities through complex organizational challenges, championed quality outcomes, and supported teams in delivering exceptional resident-centered care.

Today, as Director of Partner Relations at Marketing Essentials, Melissa leverages her deep industry knowledge and MBA training to guide senior living organizations toward stronger sales, marketing, and engagement outcomes. She partners closely with providers to develop data-driven strategies, implement modern marketing systems, and uncover growth opportunities aligned with mission and market demand.



# The Reality of Senior Living Marketing

Senior living is not an impulse purchase.

It's emotional.

It's a multi-decision-maker.

It's trust-driven.

It's often urgent — but rarely simple.

It's not like booking a hotel. And shouldn't be marketed in that way.



# The Reality of Senior Living Marketing

Senior living is an emotionally complex purchasing decision.

Every touchpoint before, during, and after move-in doesn't just connect — it interweaves, it reinforces, it loops.



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# Objectives:

By the end of this session, participants will be able to:

- 1 Understand the loop marketing framework and its differences from traditional marketing.
- 2 Identify practical strategies and tools to loop marketing to express, tailor, amplify, and evolve the prospect's journey.
- 3 Learn how to apply loop marketing in your community by strengthening trust with prospects and generating long-term growth with advocacy.



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# What is loop marketing?

A continuous, cyclical marketing strategy that keeps prospects engaged at every stage of the marketing journey.

- It's not meant to close.
- It's built to compound.



# Why Loop Marketing Matters in Senior Living

## Senior living decisions

### involve:

Adult children  
Spouses  
Physicians  
Social workers  
Financial Planners  
Residents themselves



## The journey is:

Emotional  
Long  
Nonlinear  
Often cyclical

## A family may:

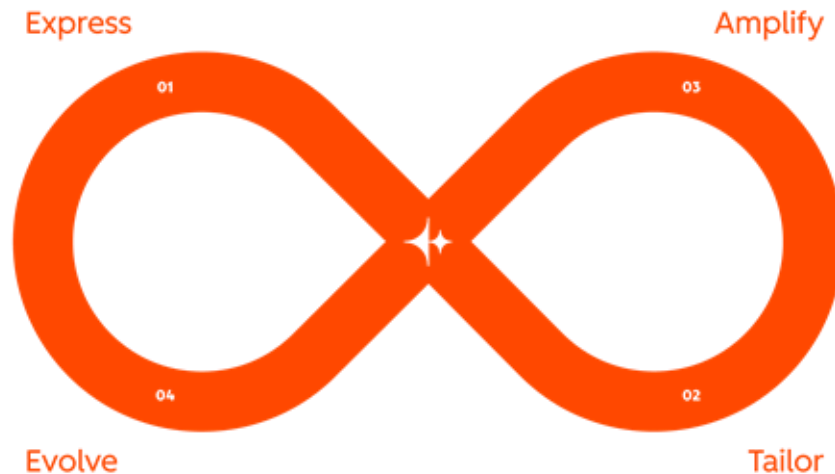
Research for 18 months  
Pause  
Re-engage  
Tour twice  
Move in  
Refer a friend six months later

# The Loop Stages

Loop Marketing, inspired by HubSpot, reimagines the traditional marketing funnel as a continuous engagement cycle.

It focuses on:

- Ongoing relationships
- Retention
- Advocacy
- Sustainable growth



# Practical Applications in Senior Living:

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## Step 1: Express – Define Your Brand Identity

Establish a core brand identity, voice and unique value proposition messaging.

## Step 2: Tailor – Personalize Messaging

Segment leads based on interest (memory care, independent living, rehab) and create highly-personalized messaging rather than broad messaging.

## Step 3: Amplify – Expand Channel Reach

Share tailored content (resident stories, staff spotlights) across diverse modern channels.

## Step 4: Evolve – Optimize in Real-Time

Continuously monitor, analyze and adjust in real-time to build momentum.



Hi Friend of Otterbein SeniorLife,

When people imagine their best chapter of life, it usually includes meaningful friendships, shared laughter, and a place where you truly belong.

At **Otterbein SeniorLife**, community isn't just something we talk about — it's something you feel every day. From morning coffee with neighbors to group fitness classes, volunteer opportunities, and shared celebrations, life here is filled with connection and purpose.

# A Family's Journey in the Loop

Scenario: Adult children, Sarah and Mike, are exploring memory care for their mother, Helen, who has early-stage dementia.



# Stage 1: Express – Brand Awareness

What the family experiences:

- Sarah searches online for “best memory care near me.”
- She sees a community blog post on “Signs Your Loved One May Need Memory Care” and a video showing your caring staff and resident activities.

Marketing action:

- Community has a consistent, compassionate brand voice.
- Messaging highlights personalized, family-focused memory care.

Outcome:

- The family recognizes the community as trustworthy and knowledgeable.



# Stage 2: Tailor – Personalized Messaging

What the family experiences:

- After downloading a guide, they receive targeted emails that answer their top questions and concerns.
- They receive invitations for a private tour that references Helen's specific needs and preferences.

Marketing action:

- Use CRM data to segment families by care level, stage of need, and prior engagement.
- Automated yet personalized messages addresses their exact concerns, not just generic follow-ups.

Outcome:

- Sarah and Mike feel the community understands Helen and sees a solution tailored to her.



## Guide to Personal Care and Memory Care at Waverly Heights



Waverly Heights, a nonprofit Life Plan Community in Gladwyn, Pennsylvania, provides a continuum of care services for older adults on a beautifully landscaped 63-acre campus. Although many residents move to residential living first, others transition directly to our personal care or memory care homes.

# Stage 3: Amplify – Multi-Channel Engagement

What the family experiences:

- They see social posts showing resident stories and staff highlights.
- Newsletter emails include a feature on your memory care program.
- AI chat on the website answers their questions in real-time.

Marketing action:

- Content is distributed via social, email, digital ads, and AI-powered channels.
- Paid campaigns target families in the local area with an interest in memory care.

Outcome:

- The family repeatedly sees your brand, reinforcing trust and credibility.



# Stage 4: Evolve – Optimize & Refine

What the family experiences:

- After the initial tour, they receive follow-up content highlighting success stories of similar residents.
- Feedback from the tour is used to personalize future outreach (e.g., tips for family involvement).

Marketing action:

- Track which content drives engagement and inquiries.
- Adjust messaging and offers in real-time to increase tour attendance and conversion.

Outcome:

- The family feels supported throughout the process, from initial research to move-in.



	Year 1	Year 2
Traffic	468,790	501,590
New Contacts (excluding offline)	6,851	10,912
MQLs	3,613	3,988
SQLs (non-hand raisers)	4,597	4,315
Opportunities (hand raisers)	2,756	3,895
Customers	334	546
Contact/Customer Conversion Rate	4.88%	5.00%

# Post-Move-In

- Helen moves in.
- Sarah and Mike receive regular updates, newsletters, and invitations to family events.
- They are encouraged to leave reviews and share their experiences.
- Positive feedback feeds back into the loop, influencing new families considering the community.

## Key Takeaways from the Family Journey:

1. Marketing doesn't end at move-in — it continues through engagement and advocacy.
2. Personalized, multi-channel messaging creates trust and reduces anxiety for families.
3. Data-driven optimization ensures every touchpoint is relevant and impactful.
4. Families become advocates, generating referrals naturally.



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# Getting Started with Loop Marketing



# Step 1: Map Your Family and Resident Journey

- Goal: Understand every stage your families experience — from first awareness to advocacy after move-in.
- Actions:
  - Identify emotional triggers, decision-makers, and pain points.
  - Map key touchpoints: website visits, social engagement, tours, onboarding, resident events.
  - Highlight where families might drop off or need additional support.

## Marketing Strategy Example:

- Use surveys or interviews with current families to identify what messaging and content helped them feel confident about choosing your community.



## Step 2: Define Your Brand (Express)

- Goal: Ensure your messaging clearly communicates what makes your community unique.
- Actions:
  - Establish brand voice, tone, and style.
  - Define your Ideal Customer Profile (ICP)
  - Create a brand guide that differentiates your messaging from generic content.

### Marketing Strategy Example:

- Develop a story-driven content series that highlights your approach to personalized memory care or resident life experiences.



# Step 3: Personalize Your Outreach (Tailor)

- Goal: Craft messaging that resonates with individual families' needs.
- Actions:
  - Segment families by interest, care level, and engagement stage.
  - Use CRM and AI tools to deliver tailored emails, guides, and invitations.
  - Go beyond inserting names — contextualize content to their concerns.

## Marketing Strategy Example:

- Send families who downloaded a dementia care guide a follow-up email with an invitation to a webinar on “Helping Loved Ones Thrive in Memory Care.”



The image shows a screenshot of an email invitation. At the top left is the Otterbein SeniorLife Marblehead logo. At the top right are social media icons for Facebook, Instagram, YouTube, and Twitter. The main heading reads "A Guided Journey in Memory Support" in a script font, followed by "Milestones at Otterbein" in large, bold, blue and green letters. Below the heading is a blurred image of stepping stones. The email body starts with "Hi Friend of Otterbein SeniorLife," followed by a paragraph of text: "We are excited to invite you to an enlightening event that will introduce a transformative approach to memory care. Join us for a presentation about Milestones at Otterbein, a program designed with a deep understanding of the needs of individuals navigating the journey of Alzheimer's and other types of dementia here at [Otterbein Marblehead](#)." Below this is a section titled "Event Details:" with three items: "Date: Tuesday, April 30", "Time: 4-6 p.m.", and "Location: Boulevard Bistro, Otterbein Marblehead".

Otterbein SeniorLife Marblehead

f i y t

*A Guided Journey in Memory Support*

# Milestones at Otterbein

Hi Friend of Otterbein SeniorLife,

We are excited to invite you to an enlightening event that will introduce a transformative approach to memory care. Join us for a presentation about Milestones at Otterbein, a program designed with a deep understanding of the needs of individuals navigating the journey of Alzheimer's and other types of dementia here at [Otterbein Marblehead](#).

**Event Details:**

**Date:** Tuesday, April 30

**Time:** 4-6 p.m.

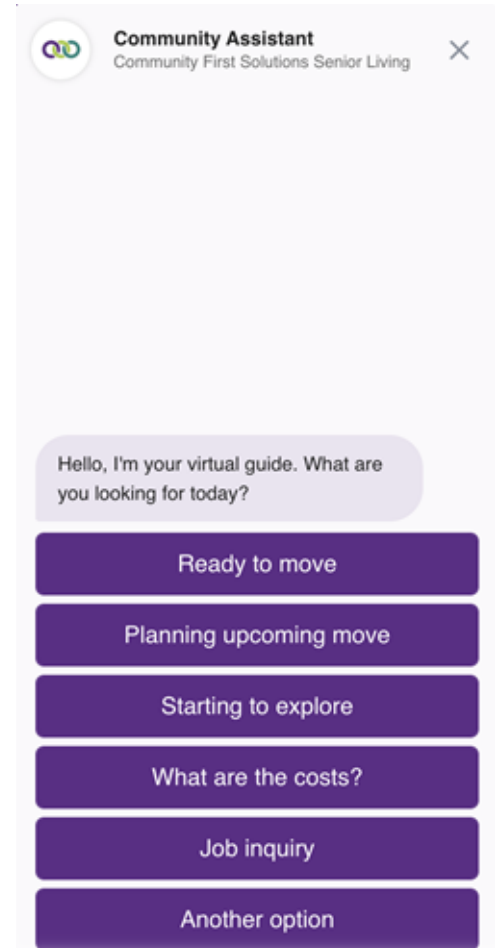
**Location:** Boulevard Bistro, Otterbein Marblehead

# Step 4: Share Content Across Channels (Amplify)

- Goal: Reach families wherever they spend time — online or offline.
- Actions:
  - Share content on social media, email newsletters, paid ads, and your website.
  - Use AI-powered tools to engage prospects via chat or personalized video messaging.
  - Collaborate with referral partners (hospitals, rehab centers) to expand reach.

## Marketing Strategy Example:

- Run a local paid social campaign featuring resident success stories, paired with email follow-ups to families who have expressed interest.



# Step 5: Optimize in Real-Time (Evolve)

- Goal: Continuously improve campaigns and messaging based on performance data.
- Actions:
  - Track metrics: engagement, inquiries, tour bookings, referral sources.
  - Use analytics and AI to A/B test messaging and campaigns.
  - Feed insights back into your brand and content strategy for the next loop.

## Marketing Strategy Example:

- Notice that video testimonials generate the highest tour sign-ups – create a short video series featuring family and resident stories and distribute across email and social channels.

Goals and Results - Visits / Leads					
Increase Website Visits by 1% per month					
Metric -	JAN	FEB	MAR	APR	MAY
1. goal	41119	41530	41946	42366	42789
2. result	46228	43127	44121	48822	51833
3. difference	5109	1597	2175	6457	9064
Website Leads (maintain conversion rate of 2.96%)					
Metric -	JAN	FEB	MAR	APR	MAY
1. goal	1217	1229	1242	1254	1266
2. result	1122	1079	1556	2267	2130
2a. forms	678	655	1047	1810	1649
2b.	494	424	509	457	483
3. difference	95	150	314	1013	856
Opportunities Delivered to Sales Team (maintain conversion rate of 2.96%)					
Metric -	JAN	FEB	MAR	APR	MAY
1. goal	449	454	458	463	468
2. result	465	438	420	599	618
2a. opportunities	281	282	220	341	437
2b.	184	156	200	168	181
2c.	0	0	0	0	0
3. difference	16	-16	-38	46	150

# Step 6: Build Advocacy

- Goal: Turn families and residents into promoters of your community.
- Actions:
  - Encourage reviews and testimonials on Google, social media, and your website.
  - Send referral thank-you campaigns and invite families to participate in events.
  - Highlight advocates in newsletters and social media to inspire others.

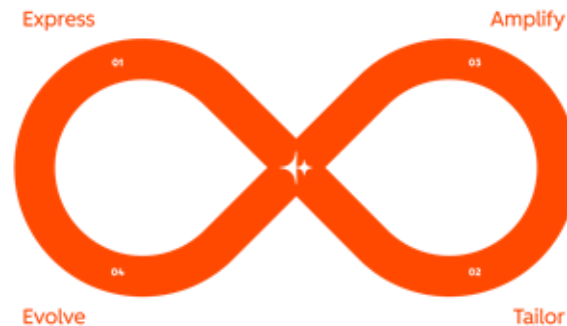
## Marketing Strategy Example:

- Launch a “Family Spotlight” campaign, featuring satisfied families sharing their story, boosting credibility and trust for new prospects.



## Step 7: Refine & Repeat the Loop

- Goal: Make the process continuous and self-reinforcing.
- Actions:
  - Review analytics regularly and iterate campaigns.
  - Adjust content and messaging based on engagement and conversion data.
  - Keep nurturing families post-move-in to sustain satisfaction, retention, and referrals.



# Tools That Support Loop Marketing

- CRM & Marketing Automation: HubSpot, Active Demand, Welcome Home
- Ads on Google/ Meta
- Organic Content on Meta/Instagram/YouTube
- Website & SEO/AI: Optimized for “assisted living near me.” Content from guides, blogs, FAQ’s, whitepapers, e-books
- Reviews & Reputation Management Tools: Care.com, Google Reviews, and platforms like Opinion, Gather Up, and Birdeye.
- Analytics: Tracking conversions and resident acquisition costs.

The HubSpot logo features the word "HubSpot" in a white, rounded sans-serif font. The "o" in "Spot" is replaced by a white robot head icon with two antennae.

The Meta logo consists of a white infinity symbol followed by the word "Meta" in a white, rounded sans-serif font.

The Google logo is the word "Google" in its characteristic white, rounded sans-serif font.

The Care.com logo features a white icon of three curved lines on the left, followed by the text "Care.com" in a white, rounded sans-serif font.

# Benefits for Senior Living Communities

- Positions you as the expert and go to source.
- Builds trust with families.
- Reduces drop-off during decision-making.
- Turns residents & families into referral sources.
- Maximizes marketing ROI by re-engaging existing contacts.



# Marketer for a Day Challenge

With your group:

- Develop a target persona for your loop marketing campaign
- Age
- Motivations
- Pain point- What do they need?
- What is the goal of your campaign? leads, traffic, awareness

# Marketer for a Day Challenge

AI has become a tool for Senior Living marketing. In your group, develop a mini marketing campaign for the persona you developed using AI.

Pull out your phone and open **any AI tool** you have — ChatGPT, Google AI Overview, Perplexity, Copilot. If you've never used one, today's the day. There are no wrong answers in this activity.



# Marketer for a Day Challenge

Act as a paid search and paid social strategist.

- Prompt your AI tool  
I am looking to build (leads, traffic, awareness, sales) for \_\_\_\_\_ (service).

Primary Persona you are targeting (be specific)

I am targeting \_\_\_\_\_ (put in information for the persona).

Create a high-level ad strategy using:

- 1) Google Search Ads
- 2) Meta (Facebook/Instagram) Ads

# Marketer for a Day Challenge

Based on the strategy you gave me:

Create:

- 3 ad ideas (visual idea + message)
  - Primary text for each ad
  - Suggest an audience targeting approach
- 
- Share with the group one test idea to improve performance

You can further ask: Give me ideas to continue to market to this prospect.

# Apply Loop Marketing

- *Map the journey - understand touchpoints.*
- *Express - define brand identity.*
- *Tailor - personalize messaging.*
- *Amplify - distribute content across multiple channels.*
- *Evolve - optimize campaigns using data and AI.*
- *Build advocacy - turn families into promoters.*
- *Repeat - create a continuous loop that generates trust, retention, and referrals.*

Start mapping your loop today to maximize every stage of the journey.

# Q&A Time!

## Get More Tips Like This in **Essential Updates** – **Exclusively for Senior Living Leaders**

Join a community of forward-thinking leaders getting the monthly insights that drive occupancy, strengthen teams and elevate resident experiences.



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