



Canopy IQ: CRM Integration and Full Circle Reporting

A Canopy IQ Case Study

Canopy: 4929 Monroe Road, Charlotte NC 28205 Sole property of Canopy Advertising Corporation, LLC. All rights reserved.

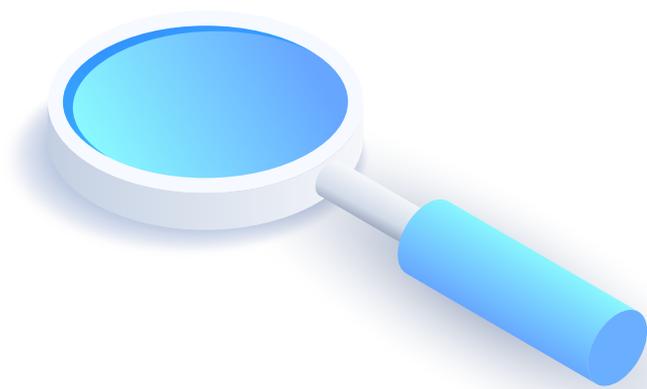
Canopy IQ: CRM Integration - Full Circle Reporting

Comprehensive reporting forms the cornerstone of contextual advertising intelligence. Without context, marketers don't have an accurate view of their ROI. We set out to simplify reporting by developing a comprehensive solution we call Canopy IQ. One of the key functions of this solution is to integrate third party CRM lead data with campaign metrics so our partners can have a 360-degree view of their campaign performance.

The most effective campaign visualization tools improve an account manager's ability to make data driven decisions. Differentiating the "signal from the noise" drastically improves the quality and viewability of a campaign manager's marketing efforts. It also helps us determine where and how each ad dollar is allocated. The following case study is based on one of Canopy's Senior Living clients. The client's campaign manager now has an in-depth view of how their marketing and advertising campaigns are generating traffic so they can see how their tactics drive the number of qualified leads they are receiving per community.

While it is critical to track where a qualified lead is coming from in order to facilitate continuous optimization, we are still missing the final piece of the puzzle. We have visibility into the beginning and the middle of the customer journey, but how do all our digital marketing efforts actually affect a community's occupancy rates?

The client we've based this case study on was able to provide us with internal monthly reports from each of its communities. These reports were then ingested and harmonized in the Canopy IQ data management system. Integrating an individual community's occupancy reports now gives us the ability to easily compare qualified leads and other campaign metrics and contrast them against actual occupancy.



A Canopy IQ Case Study

Canopy IQ: CRM Integration - Full Circle Reporting

The image shows two screenshots from a CRM dashboard. The top screenshot is a table titled 'Qualified Lead Summary Table' with columns for Activity Type, Market Source, Lead Status, New Leads, Initial Tours, Deposits, and Initial Move In(Ac) DCB ID. The bottom screenshot is a bar chart titled 'Occupancy Rates' showing percentages for various categories.

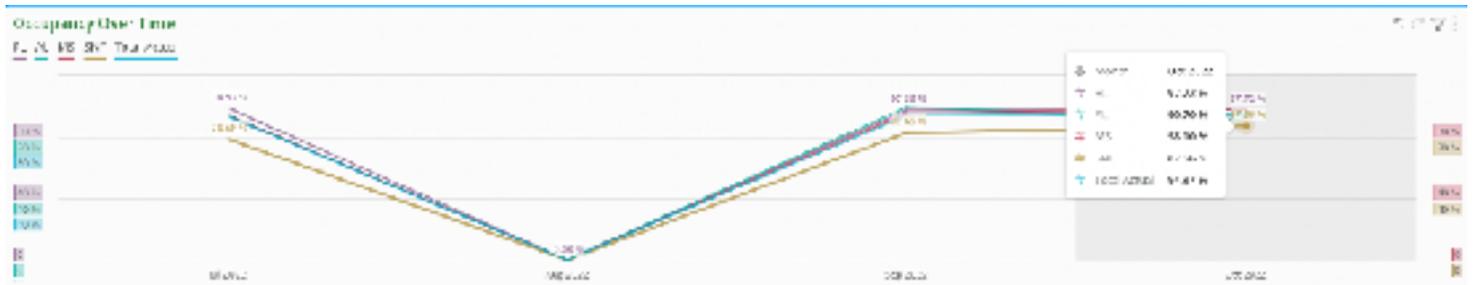
Activity Type	Market Source	Lead Status	New Leads	Initial Tours	Deposits	Initial Move In(Ac) DCB ID
Web Form	WE-SEO	N/A	18.00	0.00	0.00	0.00
Web Form	WE-Direct	N/A	3.00	0.00	0.00	0.00
Web Form	WE-Community Website	N/A	9.00	0.00	0.00	0.00
Tour - Initial	WE-Community Website	N/A	0.00	1.00	0.00	0.00
Callin	WE-Community Website	N/A	1.00	0.00	0.00	0.00
Web Form	WE-Referral	N/A	2.00	0.00	0.00	0.00
Tour - Initial	WE-Referral	N/A	0.00	2.00	0.00	0.00
Web Form	WE-PPC - Search - Google Ads	N/A	2.00	0.00	0.00	0.00
Walk In	WE-PPC - Search - Google Ads	N/A	1.00	0.00	0.00	0.00
Tour - Initial	WE-PPC - Search - Google Ads	N/A	0.00	2.00	0.00	0.00
Callin	WE-PPC - Search - Google Ads	N/A	3.00	0.00	0.00	0.00
Tour - Initial	WE-Resident	N/A	0.00	1.00	0.00	0.00
Walk In	WE-Resident	N/A	0.00	0.00	0.00	1.00
Callin	WE-Resident	N/A	1.00	0.00	0.00	0.00
Total			44.00	9.00	0.00	2.00

Community Name	SL	SL	SL	SLP	Total Actual
	81.12%	90.16%	98.70%	81.28%	94.87%

The graphic above references a portion of the client's 24/7 reporting dashboard which we've filtered down to reflect a specific community (the community names have been redacted to maintain client confidentiality). In this graph we can see all of the qualified leads which resulted in tours and actual move-ins. We can also compare those data points to monthly occupancy rates. In this case, we can see the occupancy rates for each sub-service of the community which span residential living, assisted living, memory care, skilled nursing, as well as the sum total.

While it is helpful to compare month-to-month qualified leads to occupancy rates on a monthly basis, the pivotal insights come from visualizing occupancy rates over time. By doing this, we can better understand how our campaign strategies, seasonality factors, and lead generation processes impact occupancy on a community basis. These data points greatly improve an Account Manager's ability to identify stress points within the campaign strategy and to create year-round best practices tailored to each community and their target audiences.

Canopy IQ: CRM Integration - Full Circle Reporting



The visual above is a three-month example of the occupancy rate for a specific community. The data can be viewed as a whole or broken down based on specific factors. In this case, all subsections of services offered are graphed, however, we could only view either the total, or one specific subsection at a time. As we continue to collect and integrate data, the level of insights and accuracy will continue to improve. Best practices have proven that it takes at least six months of data to give us an accurate picture of how rates can fluctuate over time.

Canopy IQ has enabled us to give clients as full a view of the customer journey as possible. Being able to demonstrate how campaign metrics are driving traffic, what the driven traffic looks like, and how that traffic contributes to their bottom line is critical in today's digital marketing industry.

Clients want to see the full effect of their marketing efforts and are consistently looking to identify new opportunities for campaign and lead generation growth. Canopy IQ makes all of this possible through full harmonization of campaign metrics, third party CRM data, and internal reporting.

A Canopy IQ Case Study