

CASE STUDY

How Cedarhurst Uses Marchex to Find Missed Leads, Improve Call Handling, and Make Smarter Marketing Decisions



283

Marketing-qualified leads identified

55

Sales inquiries recovered from non-sales IVR

8

Communities in pilot



CALL TRACKING

CONVERSATION INTELLIGENCE

LEAD QUALIFICATION

MEDIA ATTRIBUTION

SALES PROCESS IMPROVEMENT

HEADQUARTERS
St. Louis, Missouri

FOUNDED
2007

COMPANY WEBSITE
www.cedarhurstliving.com

Cedarhurst Senior Living is a premier operator of over 55 senior housing communities across the Midwest and Southeast. It provides independent living, assisted living, and memory care services designed to help older adults live with dignity, independence, and fulfillment.

Marchex helps Cedarhurst Senior Living understand what is really happening across inbound calls, giving marketing, sales, and operations the visibility they need to improve lead capture, community performance, and caller experience across 50+ locations.

The Challenge

For Cedarhurst Senior Living, inbound calls are one of the most important signals of interest from prospective residents and their families. But with more than 50 communities, not every call tells a simple story.

Some calls are true sales inquiries. Others come from current residents, family members, vendors, job seekers, or people trying to reach a specific community contact. And even when a caller does have sales intent, that intent does not always make it cleanly into the CRM.

Andrea Backes, Digital Marketing Director at Cedarhurst Senior Living, explained why missed follow-up carries such high stakes in senior living

“You don’t casually shop for senior living. These callers are moving somewhere. When leads are missed or follow-up breaks down, that can quickly turn into millions of dollars in missed revenue.”

That created a challenge for Cedarhurst’s marketing and sales teams. When inquiry volume looked low, the natural response was to consider increasing media spend. But without a clear view into what was happening on the phone, it was difficult to know whether a community needed more demand or whether existing demand was being missed, misrouted, or never captured in the CRM.

Cedarhurst needed a better way to answer a more strategic question:

Are we truly short on leads, or are we failing to capture the leads already coming in?

The Solution

Cedarhurst and Marchex ran a six-week pilot across eight communities to evaluate how AI-powered conversation intelligence could improve lead qualification, call routing, and follow-up.

Marchex gave Cedarhurst direct visibility into inbound call activity across its communities, helping the team understand not just where calls were coming from, but what happened during the conversation.

What began with one internal champion surfacing call recordings to sales leadership quickly expanded into a broader operating tool. Andrea started using Marchex recordings to highlight opportunities to improve the customer experience. From there, Cedarhurst’s VP of Sales began listening regularly, the paid media team began using Marchex for

traditional media attribution, and operations leaders were brought in during the pilot after the team recognized the value of monitoring calls coming through Google Business numbers.

Today, Cedarhurst has onboarded regional sales and marketing leaders and made call tracking review a standard first step when inquiry volume falls short of expectations. Instead of defaulting to more paid media spend, teams can first investigate whether leads are already coming in but not being captured or followed up on properly.



The Pilot

As part of a Senior Living AI Signals pilot, Cedarhurst and Marchex evaluated inbound call activity across eight communities.

The pilot gave Cedarhurst a way to evaluate whether AI-powered conversation intelligence could identify sales intent more accurately, reduce non-sales noise, and create cleaner lead data for routing and follow-up.

The pilot analyzed 3,697 calls across eight communities and identified 283 marketing-qualified leads. It also surfaced 55 sales-relevant callers who had selected the non-sales IVR path, showing that meaningful buying intent was sometimes hidden in conversations that traditional routing logic would have missed.

That finding became an important proof point: in senior living, families do not always identify themselves as “sales leads.” They may call to ask about pricing, availability, memory care, insurance, tours, or care options. The conversation often reveals intent even when the caller’s menu selection does not.



The Results

1. Cedarhurst found leads that were not making it into the CRM

One of the biggest insights from Marchex was that low inquiry volume did not always mean low demand.

In some communities, Cedarhurst discovered that leads were already there, but they were not being properly captured in the CRM. That changed the internal response to performance issues. Instead of immediately increasing media spend, teams began reviewing call activity first to understand whether the problem was demand generation, lead capture, routing, or follow-up.

2. Cedarhurst improved call handling and routing

The pilot exposed gaps in how inbound inquiries were being handled. In response, Cedarhurst conducted sales training around best practices for answering and transferring calls.

More significantly, Cedarhurst began implementing a new call tree across its portfolio designed to route sales leads directly to the Director of Sales, bypassing the concierge. The team is also auditing what happens when the concierge is unavailable and becoming more intentional about the caller experience in those moments.

3. Cedarhurst gave regional and operations teams direct visibility

Before expanding Marchex usage, many teams had to rely on secondhand information about what was happening at the community level.

Now, regional sales, marketing, and operations leaders have direct access to call insights. That gives them a clearer view into community performance, caller experience, and whether local teams are following up on inbound interest properly.

4. Cedarhurst made media decisions with more confidence

Marchex has become a foundational visibility tool for Cedarhurst's marketing strategy. The team uses it to evaluate media investment, sharpen channel strategy, and better understand which communities respond to which media plans.

This is especially important across a 50+ location portfolio, where a one-size-fits-all approach does not always work. Marchex helps Cedarhurst see what is working where, so the team can make smarter investment decisions across the portfolio.

5. Cedarhurst created a stronger foundation for future nurture

The pilot also helped Cedarhurst identify caller segments that may need more intentional follow-up, including sales prospects who called but were never captured in the CRM.

That opens the door for more targeted relationship-building, SMS nurture, email marketing, and future attribution work. As Cedarhurst's usage matures, the team wants to better understand which channels and touchpoints are driving calls and conversions, and use that insight to make smarter portfolio-wide decisions.



The Impact

For Cedarhurst, inbound calls are now treated as a strategic data source rather than a simple communication channel.

Instead of only reviewing campaigns after the fact to determine whether they worked, Cedarhurst now has a more granular view into what is driving engagement, where calls are breaking down, and whether sales opportunities are being captured.

For a senior living organization operating across 50+ communities, that visibility matters. It helps Cedarhurst maintain consistency while still recognizing that each community may have different needs, different caller patterns, and different media performance.

As Andrea shared, Marchex quickly moved from a pilot tool to something Cedarhurst genuinely relies on. The value showed up in real decisions, process changes, and conversations across multiple levels of the organization. The pilot also helped Cedarhurst identify caller segments that may need more intentional follow-up, including sales prospects who called but were never captured in the CRM.

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