



McLean's 2024 marketing campaign for a planned expansion was so successful it exceeded the goal one month early; it is currently 34% over goal as of mid-July 2025. The campaign has grown Vantage Membership by 258.1%. Using Sabal's list, the sales team has a 35.9% attendee-to-deposit conversion rate.



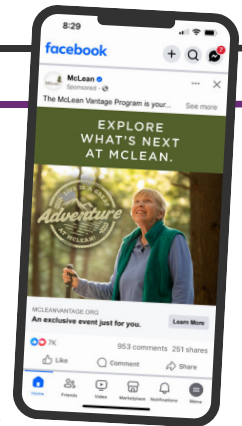
THE OBJECTIVES

Sabal Strategy and Illumia combined their expertise to execute a 2024 expansion marketing campaign for McLean — a not-for-profit Life Plan community. The campaign's goal was to add 122 new Vantage Program Members. The McLean community is located in Simsbury, CT, with a population of ~24,500.



CUSTOMIZED SOLUTIONS

- An in-depth analysis of McLean's CRM provided critical profile data.
- A custom MicroModeling Report identified a specific, qualified audience.
- The top 17,054 matches were chosen as the target audience.
- A cohesive, 3-month campaign leveraged:
 - A postcard invitation followed by 2 emails for monthly events.
 - Social media ads, display ads and retargeting ads ran for 2 months.
- Individuals who visited the website were served retargeting campaign ads.
- A matchback analysis was conducted to further refine the target audience in 2025.



SUCCESS METRICS

- McLean exceeded the campaign's goals one month early by 10%; the goal was 122 new members.
- The full campaign
 - Added 565 new leads to McLean's CRM.
 - Increased Vantage Membership 258.1%, growing from 31 to 164 members.
- Overall, the sales team has a:
 - 29.9% conversion rate for new leads to depositors, exceeding the 5% industry benchmark.
 - 33.5% conversion rate for attendees to depositors for the full campaign.
- The average age of 75 for new Vantage Members is lower than expected.
- The Sabal prospecting list was used for six event mailers, resulting in 91 new depositors with a 35.9% attendee-to-deposit conversion rate.
 - In November 2024 using Sabal's list, they converted 17 depositors, the highest one-month event conversion rate of the campaign.
- The Illumia team matched 105 names of new Vantage Program members to the prospecting lists.
 - 68.6% of the prospect matched depositors (name+address) were from the Sabal list.
 - 68.5% of new Vantage Program members are in the top 2 deciles (representing the highest match to prior depositors and recent residents) of Sabal's modeled list.

565 NEW LEADS

....

33.5% CONVERSION RATE

....

91 NEW DEPOSITORS