

90-Day Marketing Calendar and Scorecard

A printable companion to the California RCFE 90-Day Marketing Action Plan. Plan weekly actions, track inquiries and tours, and focus on the next practical improvement.

Facility:

Start date:

Plan owner:

90-day targets

Measure	Current	90-day target	How measured
Qualified inquiries per month			
Tours scheduled per month			
Tours completed per month			
Move-ins per month			
Active referral relationships			
Average first-response time			

Three phases

Phase	Weeks	Primary focus	Required outcome
Foundation	1-4	Accurate listing, clear offer, photos, inquiry process, tour readiness	Families can find, understand, and contact the home.
Outreach	5-8	Referral relationships, local visibility, follow-up, reviews	A consistent source of qualified conversations begins.
Improve	9-13	Measure results, fix conversion gaps, repeat productive actions	The owner knows what produces inquiries, tours, and move-ins.

Important

These worksheets provide general educational and organizational guidance. They are not legal, medical, accounting, employment, insurance, tax, or licensing advice. California requirements change, and each facility may have different license conditions. Verify current requirements with the California Department of Social Services, applicable local agencies, and qualified professionals.

Weeks 1-4: Build the Foundation

Complete the essentials before increasing outreach. Every public statement should match the home's approved license, actual services, availability, and resident fit.

Facility:

Month:

Owner:

Week	Focus	Action	Owner	Done
1	Offer and audience	Write the home's plain-language description, best-fit resident profile, services, differentiators, and contact process.		
1	Listing accuracy	Verify name, address area, phone, email, capacity, availability, care details, and license-related claims.		
2	Photos and trust	Create a current photo checklist, update images, and remove misleading or outdated information.		
2	Inquiry response	Create a same-day response routine, qualification questions, response templates, and follow-up dates.		
3	Tour readiness	Prepare the home, staff roles, tour route, rate explanation, information packet, and follow-up process.		
3	Tracking	Start recording referral source, inquiry date, response time, status, tour, outcome, and next action.		
4	Website and profiles	Check website, directory profiles, maps information, social profiles, and contact links for consistency.		
4	Baseline review	Record four weeks of baseline activity and identify the largest gap: visibility, response, tour, or fit.		

Notes and decisions

Date	Finding	Decision / next action	Owner

Weeks 5-8: Build Consistent Outreach

Choose relevant local relationships and helpful follow-up. Avoid bulk outreach that does not match the home's location, services, or resident fit.

Facility:

Month:

Owner:

Week	Focus	Action	Owner	Done
5	Referral list	Build a focused contact list: hospitals, rehabilitation, home health, hospice, geriatric care managers, senior centers, and community professionals.		
5	Introduction	Prepare a short introduction explaining location, capacity, resident fit, availability, and direct contact information.		
6	Outreach block	Schedule two focused outreach blocks and record each conversation and next step.		
6	Family education	Create one useful answer to a common family question and share it through an appropriate channel.		
7	Follow-up	Follow up with referral contacts and families who requested more information or toured.		
7	Reputation	Create a respectful review-request process that protects privacy and does not pressure residents or families.		
8	Community visibility	Choose one local event, professional group, or community relationship worth maintaining.		
8	Quality review	Review inquiry quality, response time, tour completion, and reasons prospects did not move forward.		

Referral follow-up

Organization / person	Last contact	Next action	Due	Result

Weeks 9-13: Measure and Improve

Keep the actions that produce qualified conversations. Fix the largest conversion gap before adding more marketing channels.

Facility: _____

Month: _____

Owner: _____

Week	Focus	Action	Owner	Done
9	Source review	Compare inquiry volume and quality by referral source. Pause low-value activity that cannot be improved.		
10	Response review	Audit response time, missed calls, incomplete follow-up, and unclear ownership.		
10	Message review	Compare family questions with the listing, website, pricing explanation, and tour materials.		
11	Tour review	Identify why scheduled tours did not happen and why completed tours did not advance.		
11	Fit review	Clarify resident-fit language so the home receives fewer unsuitable inquiries.		
12	Relationship review	Choose the referral relationships worth maintaining and set the next useful touchpoint.		
12	Reputation review	Update photos, availability, answers, and review requests based on current operations.		
13	Next 90 days	Set the next targets, recurring weekly schedule, owners, and budget based on measured results.		

Keep, improve, stop

Keep	Improve	Stop or pause

Weekly Marketing Scorecard

Use one row per week. Count only activity completed during that week and use consistent definitions across the 90-day period.

Facility: _____

Start date: _____

Reviewer: _____

Week	Inquiries	Qualified	Tours set	Tours done	Move-ins	Referral contacts	Reviews	Notes
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								

Definitions

Qualified inquiry: a prospect that appears to match the home's location, availability, services, approved conditions, and financial expectations closely enough to continue. Use the same counting rules every week.

Conversion review

Measure	Calculation	Result	What will improve it?
Qualification rate	Qualified inquiries / all inquiries		
Tour scheduling rate	Tours scheduled / qualified inquiries		
Tour completion rate	Tours completed / tours scheduled		
Move-in rate	Move-ins / tours completed		

Referral Relationship and Monthly Review

Track useful relationships, not just a large contact list. Record what each organization needs, the last meaningful contact, and the next agreed action.

Facility: _____

Review date: _____

Owner: _____

Organization / contact	Type	Last contact	What they need	Next action	Due

Monthly review

Question	Answer
Which sources produced the most qualified inquiries?	
Where did prospects stop: response, qualification, scheduling, tour, or decision?	
What did families ask that our public information does not answer clearly?	
Which two actions should receive more time next month?	
Which action should be stopped, simplified, or delegated?	
What is the single most important occupancy action for next month?	

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