

## Case Study

# How HumanGood Uses Texting for Convenient and Compliant Communication



✓ **Enhanced**  
resident and family  
communication

✓ **500%**  
increase in SMS  
volume

✓ **Compliant,**  
secure, trackable  
communications

## Introduction

HumanGood is the largest nonprofit provider of senior housing in California and the sixth-largest in the nation. The organization, which currently serves over 15,000 residents across more than 125 life plan and affordable housing communities, was also recently named Best Continuing Care Community by U.S. News & World Report.

But beyond providing an exceptional quality of life for older adults, the organization is also committed to helping

prospective residents' adult children and families navigate the eldercare system — an experience that can often feel overwhelming.

“We’re all potentially going to be dealing with this in our lifetimes,” says Joe Castro, Director of Data Analytics at HumanGood. “Our goal is to help everyone find a place where they feel safe and comfortable.”

## The Challenge

For many families, exploring senior living options, and especially memory care and skilled nursing services, is an emotionally difficult experience. The HumanGood team aims to support families along every step of this journey, from finding the right community and gathering paperwork to coordinating move-in and laying the groundwork for open, ongoing communication as residents settle in.

Texting quickly became an invaluable part of these efforts. But because team members were texting on their personal devices, it also introduced a few challenges.

First, navigating SMS compliance proved tricky. If salespeople inadvertently texted prospective residents and families without obtaining proper consent, for example, it could expose the organization to regulatory penalties.

Second, because these conversations lived on personal

devices, they were difficult to track. Sales teams had to manually log chat details in Salesforce, which was an incredibly time-consuming task that pulled them away from valuable face time with residents and their families.

And finally, if the salesperson left the organization, these conversations left with them.

As the leader tasked with integrating new tech to support revenue operations, Joe knew he needed to find a better option.

“The question became, ‘How can we develop systems and use technology so our sales professionals can put all their time, energy, and effort into the families?’” Joe explains. “Because nothing happens if they’re not there with the families in person, getting to know what they need, and helping them decide whether we’re a good fit for them.”

## The Solution

Ultimately, HumanGood decided to partner with TrueDialog to build a more convenient and compliant SMS program. Joe notes that he was immediately impressed by the TrueDialog team when they walked him through each onboarding step and communicated regularly throughout the setup process.

Once he had the platform up and running, Joe worked closely with one of HumanGood's community directors to test the new texting program, and the impact was immediately visible.

"There was a woman who was the primary caregiver for her mother, and she was interested in exploring memory care

at our community," Joe says. "But every time she tried to come in and tour the community or even talk with us on the phone, her mom became very distressed."

Thankfully, by using TrueDialog, the community director was able to communicate directly with the prospective resident's daughter via text, answer her questions, and even share paperwork — all without disturbing her mother.

"TrueDialog allows us to meet families where they need to be met," Joe says. "It's helped us help families who are in particularly difficult circumstances."

## The Results

Today, TrueDialog is an essential part of HumanGood's business operations. What began with just eight [10-digit long codes](#) has now expanded to 68. Additionally, the organization has grown its monthly message volume from 4,000 messages to about 25,000 — an increase of more than 500% in just a few months.

In addition to easing communication with prospective resident families, the TrueDialog platform has also streamlined the sales teams' experience.

Now there's no need to manage multiple conversations on their personal devices or transcribe every SMS conversation. Because TrueDialog natively integrates with Salesforce, the HumanGood team can text contacts directly from the CRM, and the system automatically captures and saves conversation details.

"This allows our salespeople to focus on their role as counselors, and to spend their time and energy getting to know families and understanding their needs," Joe says. "At HumanGood, we're committed to caring, compassion, and empathy, and TrueDialog has enabled us to empathize and

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**– Joe Castro**  
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HumanGood now looks to implement TrueDialog into their HubSpot instance to empower their marketing team and business development teams with texting.