

# CASE STUDY

## TRANSFORMING FRUSTRATION INTO FOCUS — A STRATEGIC MARKETING OVERHAUL FOR AN 8-COMMUNITY SENIOR LIVING OPERATOR

### THE CLIENT

A privately held senior living operator with eight communities across the Southeast, offering a mix of Independent Living, Assisted Living, and Memory Care. The communities range in size and stage—some stabilized, others in active lease-up.

### THE CHALLENGE

Despite investing on average **\$5,000 per month per community** in a mix of digital and print marketing—with an outside agency managing execution—the CEO and leadership team had **no clear understanding of where that money was going, how it was performing, or what ROI was being generated**. Reports lacked clarity, communication was infrequent, and each month felt like money was simply “spent,” not strategically invested.

There was no connection between ad spend and actual outcomes like tours or move-ins. No performance benchmarks tied to community-specific occupancy goals. And while leads trickled in, occupancy gains lagged, leaving the CEO frustrated and flying blind.



### THE SOLUTION:

That’s where Bild & Co stepped in. Leveraging our deep understanding of sales, marketing, and operations in the senior living space, we built an end-to-end marketing intelligence system from the ground up.

Here’s how we did it:



#### CRM Integration & KPI Design:

We pulled historical and real-time lead data directly from the client’s CRM and linked it to ad spend by channel, **giving a full picture of cost** per lead, cost per tour, and cost per move-in—by community, source, and campaign.



#### Strategic Goal Alignment:

We tied marketing performance to **real-time occupancy goals**. By identifying each community’s vacancy count and applying their unique inquiry-to-tour and tour-to-move-in conversion ratios, we built a formula that told the operator **exactly how many leads, tours, and move-ins were needed per week** to stay on track with annual sales targets.



#### ROI-Based Decision Making:

With benchmarks in place, we conducted a full analysis to identify **which marketing efforts actually produced move-ins and revenue**. We separated “busy work” from bottom-line results.



#### Local Market Customization:

Instead of treating the portfolio as one-size-fits-all, we drilled down hyper-locally:

- Identified markets where grassroots marketing outperformed digital ads.
- Highlighted overreliance on third-party aggregators that drained time but delivered minimal ROI.
- Showed which print campaigns were working—and where they weren’t.
- Revealed communities with significant untapped referral potential.



#### Marketing Dashboard Deployment:

We created a simple, visual dashboard that tracked:

- Leads per month, per community
- Monthly ad spend
- Cost per lead and cost per move-in
- Conversion ratios (Inquiry → Tour, Tour → Move-in)
- Progress to goal (weekly and monthly)
- Best and worst-performing campaigns

# CASE STUDY



## THE OUTCOME:

In less than 90 days, the operator moved from confusion to clarity.  
For the first time, they had:

- **A clear roadmap** of what was needed to fill their communities
- **Data-backed insight** into where to increase or decrease marketing spend
- **Confidence in decision-making** grounded in fact—not feeling
- A way to hold their existing marketing agency **accountable to real performance metrics**

We worked directly with their retained agency to educate them on our KPI system and reporting expectations, so they could improve execution moving forward. Because at Bild & Co, our goal isn't to replace agencies—it's to empower leadership with facts, so they can make better decisions—no matter who they work with.



## THE TAKEAWAY:

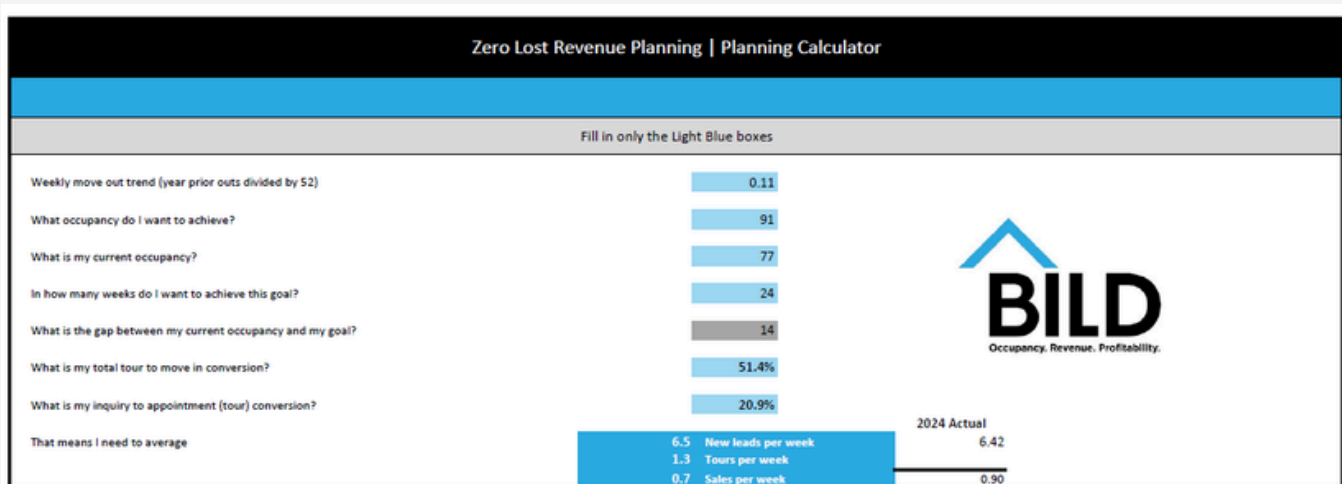
Marketing is no longer optional in senior housing—**80%+ of all leads now originate online**. But more marketing isn't the answer. **Smarter marketing is.**

Every community has a unique service area, demographic profile, and competitive landscape. No two communities should ever have the same marketing plan. And unless your marketing strategy is fully aligned with sales performance and operational targets, you're not investing—you're just spending.

**If you're a CEO frustrated by unclear marketing ROI, inconsistent communication, or marketing reports that make no sense—there is a better way.**

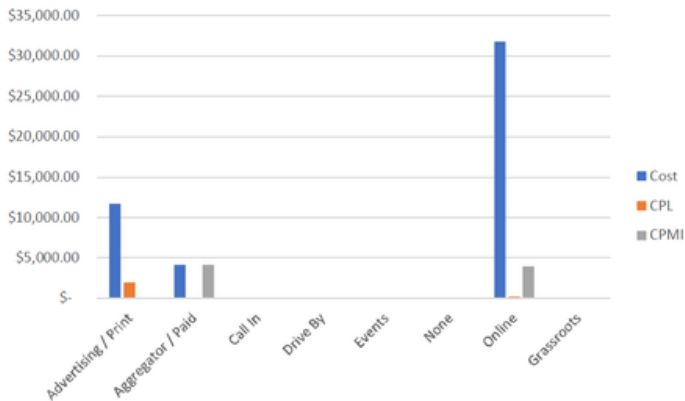
Check out the dashboard below to see the visibility now in place for a single location within this portfolio!

## THE DASHBOARD

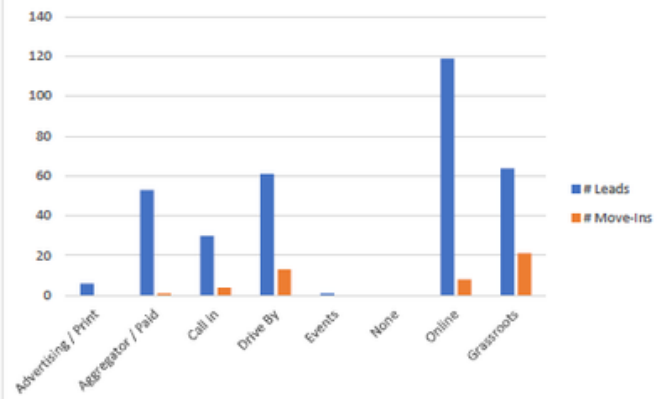


# THE DASHBOARD EXAMPLE

Marketing Budget Analysis



Leads & Move-Ins by Source



## Key Results

1. Avg. Monthly Marketing Spend	\$ 3,978.83
2. Avg. Monthly Leads Generated:	27.83
3. Avg. Monthly Move-Ins:	3.92
4. Avg. Cost Per Lead (CPL):	\$ 142.95
5. Avg. Coster Per Move-In (CPMI):	\$ 1,015.87

Annual Ad Spend (1/1/24 - 12/12/24)										
Category Name	Channel	Annual Marketing Spend	Leads	Move-Ins	CPL	% of Move-Ins to Leads	CPMI	Avg Rent	21 Month Revenue	ROI
Advertising / Print		\$ 11,735.00	6	0	\$ 1,955.83	0%		\$ 5,000.00	\$ -	\$ -
Aggregator / Paid		\$ 4,185.00	53	1	\$ 78.96	2%	\$ 4,185.00	\$ 5,000.00	\$ 105,000.00	\$ 105,000.00
Call In		\$ -	30	4	\$ -	13%	\$ -	\$ 5,000.00	\$ 420,000.00	\$ 420,000.00
Drive By		\$ -	61	13	\$ -	21%	\$ -	\$ 5,000.00	\$ 1,365,000.00	\$ 1,365,000.00
Events		\$ -	1	0	\$ -	0%	\$ -	\$ 5,000.00	\$ -	\$ -
None		\$ -	0	0	\$ -		\$ -	\$ 5,000.00	\$ -	\$ -
Online		\$ 31,826.00	119	8	\$ 267.45	7%	\$ 3,978.25	\$ 5,000.00	\$ 840,000.00	\$ 808,174.00
Grassroots		\$ -	64	21	\$ -	33%	\$ -	\$ 5,000.00	\$ 2,205,000.00	\$ 2,205,000.00
<b>Total or Avg.</b>		<b>\$ 47,746.00</b>	<b>334</b>	<b>47</b>	<b>\$ 142.95</b>	<b>14%</b>	<b>\$ 1,015.87</b>		<b>\$ 4,935,000.00</b>	<b>\$ 4,903,174.00</b>

Leads Generation (1/1/24 - 12/12/24)										
Category	Channel	Annual Spend	Leads	Move Ins	Move-Ins (7.5% of leads)	Web to Lead Conversion	CPL	CPMI	21 Month Revenue	ROI \$ (Rev. - CPMI)
Advertising / Print	Click + to see individual category	\$ 11,735.00	6	0			\$ 1,955.83	\$ -	\$ -	\$ -
Aggregator / Paid	Click + to see individual category	\$ 4,185.00	53	1			\$ 78.96	\$ 4,185.00	\$ 105,000.00	\$ 105,000.00
Call In	Call In		30	4			\$ -	\$ -	\$ 420,000.00	\$ 420,000.00
Drive By	Drive By		61	13			\$ -	\$ -	\$ 1,365,000.00	\$ 1,365,000.00
Event Sub-Total	Click + to see invidual category	\$ -	1	0			\$ -	\$ -	\$ -	\$ -
None	None								\$ -	\$ -
Online Sub-Total	Click + to see invidual category	\$ 31,826.00	119	8			\$ 267.45	\$ 3,978.25	\$ 840,000.00	\$ 808,174.00
GrassRoots	Click + to see individual category	\$ -	64	21			\$ -	\$ -	\$ 2,205,000.00	\$ 2,205,000.00
<b>Ad Spend</b>		<b>\$ 47,746.00</b>	<b>334</b>	<b>47</b>			<b>\$ 2,302.24</b>	<b>\$ 8,163.25</b>	<b>\$ 4,935,000.00</b>	<b>\$ 4,903,174.00</b>



# THE DASHBOARD EXAMPLE

**Key observations and recommendations for this location based on the data provided:**

## Observations:

### Grassroots Channel Dominates Conversions:

- Grassroots efforts generate 64 leads and 21 move-ins, achieving a 33% move-in conversion rate with no associated cost.
- This channel contributes significantly to ROI.

### Drive-By Channel Shows Strong Results:

- Drive-By generates 61 leads and 13 move-ins, with no direct costs.
- This channel achieves a 21% move-in conversion rate, making it a key contributor to performance.

### Call-In Channel Delivers High ROI:

- Call-In generates 30 leads and 4 move-ins, demonstrating cost-efficiency and strong potential for further optimization.

### Online Channel Provides High Lead Volume but Moderate Conversions:

- Online campaigns generate 119 leads and 8 move-ins, achieving a 7% conversion rate.
- While the CPL is \$267.45, the CPML is relatively high at \$3,978.25.

### Aggregator/Paid Referrals Have High Costs and Minimal Returns:

- This channel contributes only 1 move-in with a CPL of \$78.96 and a high CPML of \$4,185.00, making it one of the least efficient channels.

### Advertising/Print and Events Underperform:

- Advertising/Print has a high CPL of \$1,955.83 but yields no move-ins.
- Events generate just 1 lead with no move-ins, providing no measurable ROI.

### Overall Performance Metrics:

- The average cost per lead (CPL) is \$142.95, and the cost per move-in (CPML) is \$1,015.87.
- While these metrics are moderate, the community faces a gap of 14 units to fill within 24 weeks.

## Recommendations:

### 1. Focus on Grassroots Efforts:

- Grassroots is the most cost-effective channel.
- Expand efforts by:
  - Building relationships with local organizations and businesses.
  - Hosting community events to engage with prospects directly.

### 2. Enhance Drive-By Channel:

- Drive-By is a strong performer.
- Increase its effectiveness by:
  - Improving community signage and visibility.
  - Using promotional banners or QR codes to capture interest.

### 3. Optimize Online Campaigns:

- Online campaigns generate high lead volume but have moderate conversion rates.
- Focus on:
  - Improving landing pages and follow-up processes.
  - A/B testing ad creatives and audience targeting.
  - Running retargeting campaigns to re-engage previous visitors.

### 4. Leverage Call-In Potential:

- Call-In shows great promise.
- Enhance its performance by:
  - Training staff to better handle inquiries and follow-ups.
  - Implementing tools to monitor and improve response times.

### 5. Reallocate Budget from Inefficient Channels:

- Discontinue or significantly reduce spending on:
  - Advertising/Print: High costs and no measurable ROI.
  - Aggregator/Paid Referrals: High CPML and low move-in rates.
  - Events: Low lead generation and no conversions.

### 6. Set Weekly Performance Goals:

- To meet the 24-week occupancy goal:
  - Generate 6.5 leads per week.
  - Achieve 1.3 tours per week.
  - Close 0.7 move-ins per week.

### 7. Regularly Track and Adjust Strategies:

- Monitor CPL, CPML, and conversion rates monthly. Shift resources dynamically to the best-performing channels to ensure optimal ROI.
- By focusing on high-performing channels like Grassroots, Drive-By, and Call-In, and reallocating resources from underperforming areas, this community can efficiently close the occupancy gap.

*Partner with Bild & Co to turn marketing frustration into measurable results - and grow occupancy with confidence.*

Email **revenue@bildandco.com** to get started today.