



BILD
Occupancy. Revenue. Profit.

CASE STUDY

HUMANIZING THE SALES PROCESS: HOW STRATEGIC MYSTERY SHOPPING TURNED EMPATHY INTO OCCUPANCY

THE CLIENT

A regional senior living operator with three communities in South Carolina, referred to here as **Sunset Living** (name changed for confidentiality), partnered with Bild & Co to evaluate and improve sales performance through a year-long mystery shopping initiative. With increasing marketing investments but slow occupancy growth, leadership needed to understand what was happening after leads engaged.

THE CHALLENGE

Despite spending over **\$5,000 per move-in** on digital and traditional marketing, occupancy gains were inconsistent. Leadership suspected the problem wasn't lead flow—it was **what happened during the sales interaction**.

Bild quickly uncovered:

- Transactional phone calls lacking warmth and emotional connection
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- Sales presentations that felt scripted and generic
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This wasn't a marketing problem—it was a human connection problem.



THE SOLUTION:

Research-Driven Mystery Shopping Initiative

Bild & Co conducted mystery shops across all communities—recorded, transcribed, and evaluated for:

- First impressions and professionalism
- Discovery and personalization depth
- Relationship-building and emotional intelligence
- Ability to differentiate and communicate value
- Empathy during sensitive conversations
- Clear next steps and urgency in follow-up

These weren't scorecards—they were **mirrors into the buyer experience**.



THE SALES CYCLE:

What We Measure & Why

Senior living isn't transactional—it's **transformational**. Each sales interaction must:

- Build trust and emotional safety
- Focus on the person, not just the product
- Validate family concerns and emotional triggers
- Position the community as a life solution—not just a place to live
- Drive next steps confidently and clearly

"Marketing gets them in the door. But what happens next determines whether they walk in—or walk away."





PERFORMANCE IMPROVEMENT OVER TIME

Over the course of three mystery shops, each community improved:

February 2023

- Overall Score: 50%
- Sales Presentation: 25%
- Next Steps: 46%
- *Tone: Transactional, lacked clarity or urgency.*

June 2023

- Overall Score: 60%
- *Improved warmth, personalization, and follow-up.*

September 2023

- Overall Score: 66%
- First Impressions: 96%
- Next Steps: 75%
- *Conversations were empathetic, engaging, and led confidently.*



FROM INSIGHTS TO ACTION

Our findings were used to build **customized training** and coaching initiatives:

- Sales director coaching based on individual strengths and gaps
- Training focused on storytelling, empathy, and discovery
- Follow-up protocols with emotional intelligence baked in
- Education on emotional drivers behind adult children's decisions

FROM ACTION TO RESULTS

- Double-digit increases in conversion rates
- Consistent, branded buyer experience across communities
- Higher satisfaction among prospective families
- Shorter sales cycles and fewer lost leads

Conclusion

What Gets Measured Gets Improved

CEOs invest heavily in marketing but often overlook **the most important moment**: when a lead connects with a human.

Our mystery shops provide clear insight into that moment—revealing the gaps, coaching opportunities, and real-time fixes needed to drive revenue. Mystery shopping isn't an expense. It's a growth strategy.

Ready to see how your buyer experience stacks up?

Email revenue@bildandco.com and reference this case study to receive **three complimentary shops on us**.



BILD & CO

Buyer Experience Strategy | Sales Training | Revenue Optimization



1.800.640.0688



WWW.BILDANDCO.COM



REVENUE@BILDANDCO.COM