



BILDX Executive Impact Study

The Future of Senior Living Sales Isn't More Salespeople —It's Better Sales Infrastructure

How a portfolio of seven senior living communities strengthened their sales funnel and influenced more than **\$10 million in resident lifetime revenue** during the reporting period of August 2025 – May 2026.

Executive Summary

Senior living operators don't have a lead generation problem. They have a **lead execution problem**. Families expect immediate responses, consistent follow-up, and trusted guidance during one of life's most emotional decisions. Yet today's Sales Directors are expected to answer every inquiry, conduct tours, manage events, maintain CRM data, build referral relationships, coordinate move-ins, and still increase occupancy.

The reality is simple: **One person can no longer do the work of two.** To address this challenge, seven senior living communities partnered with BILDX to serve as an extension of their on-site sales teams—not replacing Sales Directors, but providing dedicated sales infrastructure to ensure every qualified lead received timely, professional engagement.

The Challenge

Sales Directors stretched across too many responsibilities to execute consistent, relationship-based follow-up with every qualified family.

The Solution

BILDX deployed as a dedicated sales infrastructure extension—handling lead nurturing, CRM management, and prospect engagement.

The Result

Measurable operational, sales, and financial impact across seven communities over ten months of active partnership.

Executive KPI Snapshot

AUGUST 2025 – MAY 2026

Across seven participating communities, BILDx delivered consistent, measurable results in lead management, tour generation, and move-in influence. The numbers below reflect a ten-month reporting period and demonstrate the breadth of operational impact achieved through dedicated sales infrastructure support.

2,337

New Inquiries Managed

Digital and IVR inquiries handled by BILDx

1,335

Qualified Opportunities

Actively worked prospects throughout the period

391

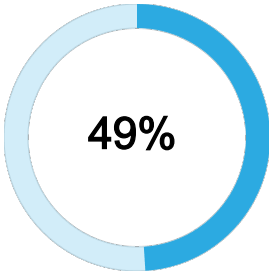
Tours Generated

Directly attributed to BILDx outreach and nurturing

84

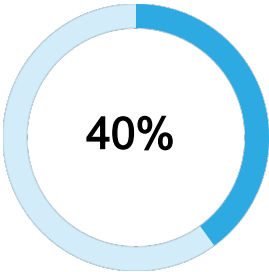
Move -Ins Generated

Move-ins directly attributed to BILDx engagement



Tour Influence

Of all community tours were influenced by BILDx out of 794 total



Move -In Influence

Of all community move-ins were influenced by BILDx out of 212 total

Source: BILDx Portfolio Performance Report. Provided by Client Data, August 2025–May 2026.

Financial Impact

Every move-in matters—not just for occupancy metrics, but for the long-term financial health of each community. Using conservative, industry-standard assumptions, the revenue potential of each BILDx-influenced move-in becomes clear and compelling for leadership teams evaluating the return on their sales infrastructure investment.

Revenue Assumptions

Average resident revenue: \$5,000 per month

Average length of stay: 24 months

Lifetime value per move -in: \$120,000 in projected resident lifetime revenue

BILDx-generated move -ins: 84 during reporting period

\$10.08M

Projected Resident Lifetime Revenue Influenced

84 BILDx-generated move-ins × \$120,000 lifetime value =
\$10,080,000 in projected resident lifetime revenue
influenced during the study period.

❏ Actual results vary based on resident acuity, pricing, and length of stay. These projections reflect conservative assumptions applied consistently across the portfolio.

Beyond Revenue: Operational Scale

The financial impact only tells part of the story. Across seven communities, BILDX absorbed a significant volume of operational work that would otherwise fall to already-stretched Sales Directors and Executive Directors. This operational relief is itself a strategic asset—one that compounds over time as on-site teams are freed to focus on the highest-value human interactions that drive occupancy.



2,337 New Inquiries Managed

Every digital and IVR inquiry received timely, professional engagement—ensuring no family was left waiting during a critical moment of decision-making.



1,335 Qualified Prospects Nurtured

Hundreds of families received consistent, relationship-based follow-up through calls, emails, texts, and CRM outreach across the full buying journey.



Sales Directors Freed to Close

With BILDX managing administrative follow-up, on-site Sales Directors focused on tours, referral relationships, deposit conversations, and family support.

This division of labor—BILDX handling lead nurturing and CRM discipline while Sales Directors conduct tours and close deposits—is the operational model that drove results across the portfolio. It isn't about working harder. It's about ensuring the right work gets done by the right person at the right time.

Why It's Working: Sales Directors Are Free to Sell

SUCCESS FACTOR 1 OF 4

After nearly a year of collaboration across seven communities, one consistent theme emerged above all others: **Sales Directors perform best when they can focus on what they do best.** Touring families, building referral partnerships, handling objections, and guiding prospects through an emotionally complex decision—these are the high-value activities that only an experienced, on-site sales professional can execute with authenticity and impact.

Yet the reality inside most senior living communities is that Sales Directors spend a significant portion of their day on activities that don't directly drive occupancy. Logging inquiry data into the CRM. Following up on leads that went cold last week. Sending a third or fourth email to a family that toured six weeks ago but hasn't made a decision. Answering a weekend call when they were supposed to be off. These tasks aren't unimportant—they're critical. But they don't require the expertise of a seasoned Sales Director.

BILDx manages the repetitive, time-intensive work **between inquiry and tour**, allowing Sales Directors to re-invest their energy into the conversations and relationships that move families from consideration to commitment. When a Sales Director's day is organized around tours, relationships, and closings—rather than inbox management—the entire sales operation performs at a higher level.

What BILDx Handles

Inquiry response, lead qualification, multi-touch follow-up, CRM documentation, scheduling coordination, and prospect nurturing.

What Sales Directors Focus On

Conducting tours, building referral relationships, closing deposits, supporting families, and driving occupancy growth.

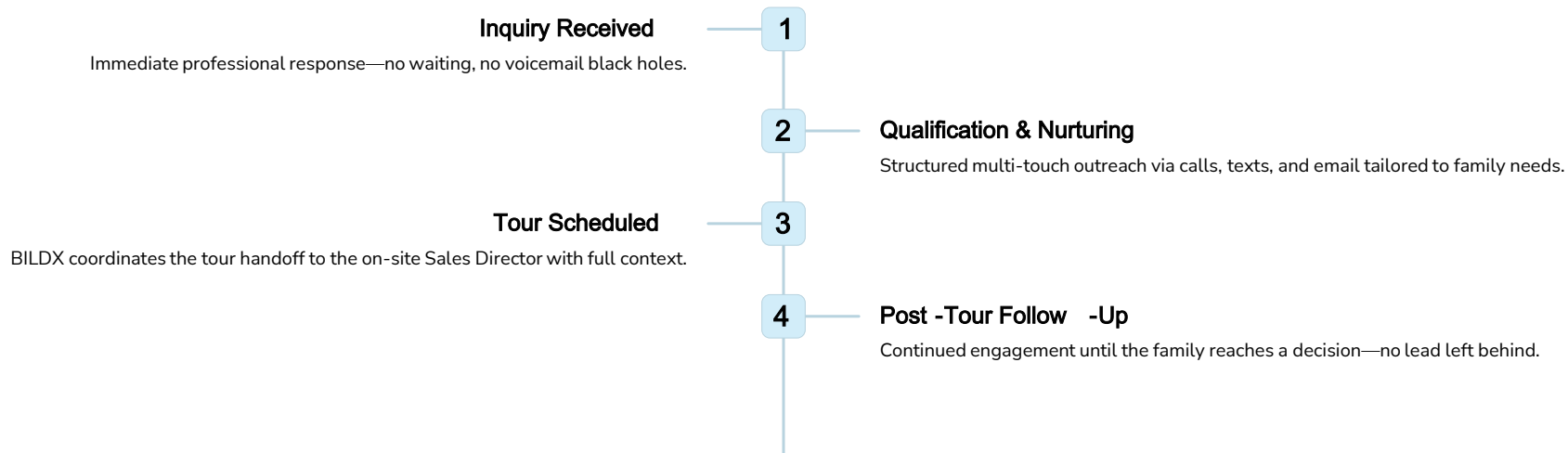
Every Qualified Lead Receives Consistent Attention

SUCCESS FACTOR 2 OF 4

Inconsistent follow-up is the silent occupancy killer in senior living. A family that inquires on a Tuesday afternoon and doesn't hear back until Thursday has already called three other communities. A prospect who toured three weeks ago and received one follow-up call is now comparing your community to a competitor who called them four times and sent a handwritten note.

The senior living buying journey is long—often spanning weeks or months—and it is emotionally charged at every stage. Families are making one of the most significant decisions of their lives, and they need to feel that the community they're considering genuinely cares about their loved one. Inconsistent engagement signals the opposite.

Rather than relying on a Sales Director's availability between tours, **BILDx ensures every qualified prospect receives timely, relationship -based engagement throughout the buying journey.** That means structured outreach at defined intervals, personalized communication that reflects the family's specific concerns and timeline, and consistent documentation in the CRM so nothing falls through the cracks—even when the Sales Director is on tour, in a meeting, or off for the weekend.



Communities Gain a Dedicated Sales Coordinator

SUCCESS FACTOR 3 OF 4

There is a fundamental difference between a call center and a dedicated sales coordinator. Call centers route volume. They answer inquiries, log information, and move on to the next call. The voice on the other end of the line is a stranger to your community, your culture, and your team. Families can feel that difference—and it erodes trust at the very moment you're trying to build it.

BILDX operates differently by design. **Every participating community is assigned a dedicated pod** —a small team of Sales Coordinators who learn that specific community's culture, care philosophy, pricing structure, team dynamics, and competitive market. Over time, they become an extension of the on-site team in every meaningful way. They know the Sales Director by name. They understand which neighborhoods generate the most referrals. They know how to position the community's unique value proposition against local competitors.

This continuity produces a qualitatively different experience for families—and a qualitatively different result for operators. When a family calls back after a tour and speaks with the same BILDX coordinator who first engaged them, trust compounds. When the Sales Director receives a warm handoff with a complete contact history rather than a cold lead, conversion rates improve. The result isn't random call routing—it's a relationship that grows stronger over time.



Community -Specific

Each pod learns your culture, team, pricing, and market positioning—not a generic script.



Continuity of Relationship

Families hear the same voice. Trust builds across every touchpoint in the buying journey.



Warm Handoffs

Sales Directors receive complete contact history and context—not cold leads with missing information.

Technology Enhances the Process —People Build Trust

SUCCESS FACTOR 4 OF 4

The senior living industry is navigating a pivotal moment in its relationship with technology. AI-driven tools, automated workflows, and digital communication platforms are increasingly present in sales operations—and they offer genuine advantages in documentation, scheduling, reporting, and workflow efficiency. BILDx embraces these tools where they add value and accelerate performance.

But there is a boundary that technology cannot cross—and senior living operators understand it better than almost any other industry. **Empathy cannot be automated. Relationship -building cannot be scripted by an algorithm. Objection handling in a conversation about a parent's safety and dignity requires human judgment, emotional intelligence, and genuine care.** A family making the decision to move a loved one into a senior living community is not completing a transaction. They are navigating one of the most emotionally complex experiences of their lives.

BILDx was built on the premise that technology should serve people—not replace them. AI plays an important role in documentation, workflow efficiency, and executive reporting. But every family interaction, every follow-up call, every tour handoff is led by a trained, empathetic Sales Coordinator who understands the weight of the decision a family is facing. Technology supports BILDx. It does not replace it—and it never will.

What Technology Does at BILDx

- CRM documentation and workflow automation
- Inquiry routing and response timing
- Reporting and executive dashboards
- Communication scheduling and tracking

What People Do at BILDx

- Empathetic family conversations
- Relationship-based lead nurturing
- Objection handling and trust-building
- Guiding families through major life decisions

What Our Client Found

The outcomes observed across the seven participating communities were not the result of a single standout community inflating the averages. They reflected a pattern of consistent, broad-based improvement across the portfolio—validating that the BILDx model produces results when implemented with commitment and partnership.

Improved Conversion Rates

Nearly every community utilizing BILDx demonstrated improved conversion rates compared with periods without BILDx support. Consistent engagement at every stage of the funnel translated directly into more families choosing to tour—and more families choosing to move in.

Increased Professional Outreach

Professional outreach volume increased across nearly every participating community. Families received more timely, more consistent, and more personalized communication—a direct result of BILDx absorbing the follow-up workload from on-site teams.

Ahead of Move-In Expectations

Six of eight participating communities were ahead of move-in expectations during the reporting period. In an industry where occupancy performance is the defining metric, this outcome carries meaningful operational and financial significance for leadership teams.

- ❑ These improvements reinforced a critical insight: **consistent engagement —not simply lead volume —is the primary driver of occupancy performance.**

Economic Value Beyond Occupancy

When senior living operators evaluate the cost of adding sales capacity, the conversation typically centers on hiring. A second full-time salesperson brings salary, benefits, training, onboarding time, turnover risk, and management overhead. One company executive estimated that deploying BILDx as an alternative to adding a second full-time salesperson can avoid approximately **\$200,000 annually** in fully loaded personnel costs—while simultaneously expanding the community's actual sales capacity.

BILDx Investment

~\$3,500/mo

Approximately **\$115 per day** — or under **\$10 per hour** of sales coverage.

What Communities Gain

- Extended sales coverage across days and hours
- Dedicated lead nurturing and qualification
- Weekend and after-hours responsiveness
- CRM discipline and documentation
- Consistent, structured follow-up
- Executive reporting and accountability
- A dedicated Sales Coordinator team

Rather than hiring another full-time employee—with all the associated costs, risks, and management complexity—communities that partner with BILDx gain expanded capacity at a fraction of the investment. The math is straightforward. The strategic advantage is significant. And unlike a new hire, BILDx arrives trained, accountable, and ready to produce results from day one.

- ❏ The \$200,000 estimate reflects an internal estimate shared by client leadership regarding the fully loaded cost of adding a second sales position, including salary, benefits, recruiting, and overhead.

Is BILDx Right for Every Community?

Honesty is a core value at BILDx—and that means being direct about where we perform best and where we may not be the right fit. BILDx is not a universal solution. It is a strategic partnership designed for operators who view sales infrastructure as a long-term investment, not a short-term fix. The communities that experience the greatest results share a common set of characteristics: committed leadership, a willingness to adopt a consistent sales process, and a genuine desire to serve every qualified family with the attention they deserve.

✓ Best Fit

- One Sales Director managing a heavy inquiry and tour workload
- Executive Directors balancing multiple operational responsibilities
- Communities seeking sustained occupancy growth without adding a full-time salesperson
- Leadership committed to consistent implementation and accountability
- Organizations seeking a long-term sales infrastructure partner

✗ Not the Best Fit

- Organizations seeking a 30–60 day occupancy turnaround
- Communities unwilling to adopt a consistent sales process
- Teams looking to replace on-site sales accountability
- Operators expecting technology alone to solve occupancy challenges

If your organization is evaluating BILDx as a strategic partner, the most important question to ask is not "How quickly will we see results?" It is "Are we committed to building a sales operation that serves every qualified family consistently over time?" If the answer is yes, BILDx was built for you.

The Bottom Line

Senior living doesn't lose occupancy because there aren't enough inquiries. It loses occupancy because qualified families—families who have already reached out, already expressed interest, already taken the first courageous step toward a major life decision—**don't consistently receive the attention, follow-up, and relationship-building they deserve.**

The gap between inquiry and move-in is not a marketing problem. It is a sales execution problem. And it is solvable—not by hiring more salespeople, not by investing in more lead generation, but by building the kind of dedicated, consistent, empathetic sales infrastructure that ensures every qualified family feels seen, heard, and supported throughout their journey.

BILDX was built to solve exactly that problem. We don't replace your Sales Director. We give every Sales Director the support of a dedicated Sales Coordinator team—helping communities convert more inquiries into tours, more tours into move-ins, and more move-ins into long-term resident relationships and the revenue that sustains your community's mission.

More Inquiries → Tours

Consistent, timely engagement converts interested families into scheduled visits.

More Tours → Move-ins

Relationship-based follow-up keeps families engaged after the tour until they're ready to decide.

More Move-ins → Revenue

Every additional move-in represents up to \$120,000 in projected resident lifetime value for your community.

BILDx Is Measurable, Accountable, and Financially Meaningful

\$10.08M

Revenue Influenced

Projected resident lifetime revenue attributed to BILDx-generated move-ins

49%

Tours Influenced

Of all community tours across the portfolio influenced by BILDx

40%

Move -Ins Influenced

Of all community move-ins across the portfolio influenced by BILDx

2,337

Inquiries Managed

New digital and IVR inquiries managed with professional, timely engagement

The data speaks for itself. Across seven communities over ten months, BILDx delivered results that are operational, financial, and human in their impact. Families received the attention they deserved. Sales Directors focused on the work that moves occupancy. Communities grew.

To discuss adding one of your communities to the BILDx family, email us at Revenue@BildandCo.com. We look forward to partnering with you.