



Seven Months of Enterprise Growth Transformation

How BILD & Co moved beyond marketing to strengthen the full occupancy and revenue engine for a 100+ year old not-for-profit Life Plan multi-location organization.

STRATEGIC INITIATIVE



More Than Marketing — A Full Business Partnership

This engagement was never just about ads or branding. We embedded ourselves into the client's operations, leadership structure, sales culture and buyer journey to build a [repeatable, sustainable growth engine](#) — one designed to sustain occupancy above 96% and create greater predictability in future move-ins.

From compensation plans to CRM workflows, from affordable housing to Life Plan buyer psychology — we worked as a true partner, not a vendor.

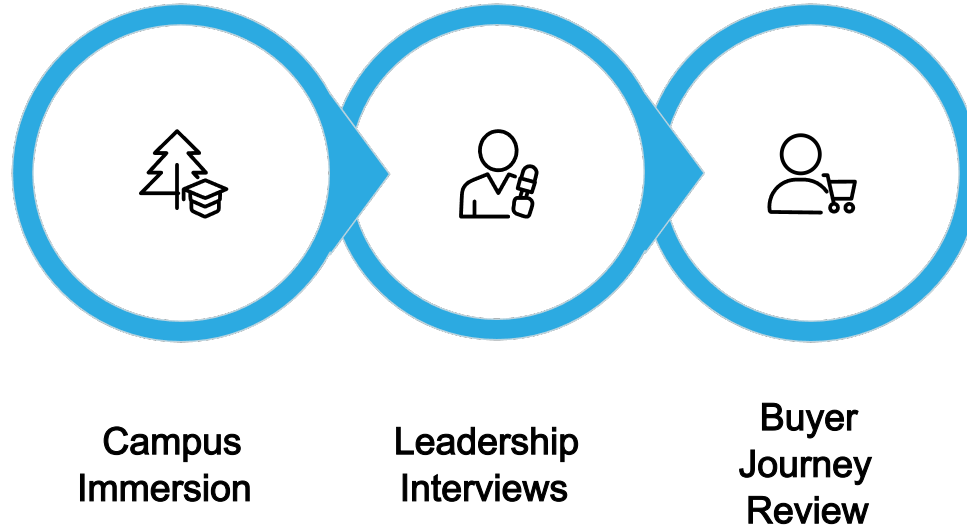
Where We Started: The Enterprise Assessment

What We Did

Conducted campus immersion, leadership interviews and a full review of the buyer journey — from first impression and inquiry through tour, follow-up and move-in — to identify conversion barriers across the organization.

Why It Mattered

You can't fix what you haven't fully seen. The assessment gave us a clear, honest picture of where growth was being won — and where it was quietly being lost — before we recommended a single change.



Aligning the Whole Organization Around Growth

Growth stalls when departments work in silos. We created a [shared growth strategy](#) so marketing, sales, clinical and operations function as one system — with common priorities, KPIs and accountability.

Sales & Marketing

Unified messaging, lead management and outreach strategy across all communities.

Clinical & Operations

Streamlined assessment and admission process, reducing bottlenecks and speeding decisions.

Leadership

Strengthened regional accountability, coaching cadences and executive-level reporting dashboards.

Reimagining the Buyer Journey

We shifted the client from a traditional promotional model to an **education-first journey** — helping prospects understand Life Plan living, contracts, fees, future care and planning *before* asking them to make a decision.

This included mid-funnel tools to prevent stalled prospects: personalized follow-up, clearer next steps, campaign sequencing, video content, text engagement and tour-status triggers — keeping relationships warm and moving forward.



Building a Referral & Outreach Engine

We built a structured professional-referral strategy across Personal Care, Memory Care and Independent Living — targeting hospitals, rehabilitation, skilled nursing, home health, physicians, senior professionals and local influencers.



Healthcare Partners

Hospitals, rehab centers, skilled nursing and home health agencies.



Physician Networks

Primary care and specialist physicians who guide families toward next steps.



Local Influencers

Senior professionals and community connectors who shape trusted referrals.

Sales Leadership, Compensation & Accountability

Sales Leadership

Strengthened regional sales leadership, clarified community-level expectations and established coaching, reporting and accountability around occupancy, outreach, tours, assessments and move-ins.

Compensation Modernization

Reviewed and revised regional and site-level compensation structures to better align incentives with organizational occupancy, conversion and revenue goals.

What Changed

When leaders are clear, teams are confident. When incentives align with outcomes, behavior follows. These structural changes created the accountability foundation that makes everything else sustainable.

Digital, CRM & Data Infrastructure

We identified opportunities to transform community websites into [educational conversion platforms](#) — Life Plan learning hubs, FAQs, comparison tools, resident stories, videos, SEO improvements and AI-search readiness.

CRM & Lead Management

Improved lead capture, response, source classification, tour documentation and follow-up workflows — with BILDx supporting response speed and pipeline recovery.

KPI Dashboards

Portfolio and campus-level dashboards connecting inquiries, response time, tours, deposits, move-ins, move-outs, referral activity, conversion and occupancy.

Marketing Team Elevation

Coached the internal team on strategy, analytics, digital performance, SEO/AEO and stronger integration with sales and operations.

Expanding Into Affordable Housing

The engagement grew to include affordable housing — a full operational review covering mystery shopping, competitive rent analysis, waitlist cleanup, inquiry-routing infrastructure, vacant-unit analysis, leasing standards and customer experience.

We also evaluated competitor rates, buyer expectations and pricing gaps to support thoughtful rent adjustments — without losing sight of qualification requirements, market demand or conversion capability.



A Growth Engine Built to Last

Every initiative connected to one goal: moving the organization from **disconnected activities** to a **repeatable, sustainable growth engine** — one that sustains occupancy above 96%, builds viable waitlists and creates greater predictability in future move-ins.

Monthly Enterprise Training

Monthly webinars uniting sales, marketing, operations and leadership around shared growth priorities and buyer psychology.

Community -Level Intervention

Targeted plans built from campus-specific data — not a one-size-fits-all approach.

Sustainable Infrastructure

Systems, accountability and culture designed to keep growing long after the engagement ends.

 BILD & Co is not a marketing firm. We are your enterprise growth partner — from the front door to the boardroom.