

87% → 95%

Inside the Sales Transformation That Changed a Senior Living Portfolio

How an embedded revenue-growth partnership transformed sales execution, strengthened accountability, and helped a multi-community senior living operator reach **94.79% occupancy**.

CASE STUDY

BILD & CO



The Situation

When BILD & Co began working with this privately held senior living operator, portfolio occupancy was hovering in the **mid-80% range**. The organization had strong communities, an entrepreneurial leadership team, and significant growth potential. What it lacked was increasingly difficult to build internally: **consistent sales leadership across every community**.

Rather than adding another traditional corporate position, the operator partnered with BILD & Co to create an embedded sales leadership model. What began as sales consulting evolved into something far more comprehensive.

- ❏ BILD effectively became the operator's **outsourced Revenue Performance Office**—working alongside ownership, community leadership, and sales teams to create the infrastructure, accountability, and execution necessary to drive portfolio-wide performance.



The Challenge

Like many multi-site senior living operators, the organization faced challenges that went well beyond generating more leads. The real issue was **execution consistency**.

Operational Gaps

- One community had a strong salesperson while another struggled
- Follow-up practices varied widely across locations
- CRM utilization needed continual reinforcement
- Pipeline management required ongoing oversight

Leadership Visibility

- New sales hires needed structured onboarding and coaching
- Community teams lacked competitive intelligence
- Marketing initiatives required coordination with sales
- Open positions created immediate revenue exposure
- Leadership needed real-time pipeline visibility—not just monthly occupancy numbers

The operator did not need another vendor providing isolated services. It needed an **integrated revenue infrastructure**.

The Solution: An Embedded Revenue Performance Team

BILD & Co assumed a role similar to a regional sales leadership function—but with significantly greater depth. The engagement expanded across virtually every component influencing occupancy.

Regional Sales Leadership

BILD conducted ongoing community-level pipeline reviews, sales strategy calls, and performance discussions designed to identify opportunities *before* they became occupancy problems.

1,200+ Pipeline Interactions

Across the multi-year engagement alone, the relationship documents **more than 1,200 community pipeline -management interactions** from 2022 through 2025—working through actual prospects, deposits, move-ins, and closing strategies.

Not Generic Coaching

Teams worked through real prospects, overdue activity, lead stages, next steps, and closing strategies—every session grounded in the actual state of each community's pipeline.



Sales Coaching & Accountability

Salespeople received hands-on, individualized coaching across every dimension of the sales process. Monthly portfolio sales strategy meetings reinforced both performance and skill development—and the team wasn't merely told what needed improvement. They were given a [framework for how to improve it](#).



Discovery & Lead Prioritization

Coaching on uncovering prospect needs, urgency, and readiness to move—so the right leads received the right attention at the right time.



Follow -Up & Tour Strategy

Systematic follow-up cadences, tour flow improvements, first-impression coaching, and objection-handling techniques built into daily practice.



Referral Development & Outreach

Professional outreach strategy, resident referral programs, CRM utilization, and closing techniques refined through real-time performance feedback.

Performance Management Down to the Lead Level

One of the most important elements of the engagement was **visibility**. BILD continually evaluated where prospects were getting stuck and helped sales teams convert activity into action.

"Data doesn't improve occupancy. Execution against the data does."

When data revealed speed-to-lead concerns, BILD brought those findings directly into sales coaching. The numbers were striking:

39.5%

Delayed Follow -Up

Of leads were taking 4–24 hours to receive a response—a critical window of lost opportunity.

14%

Critical Lag

Of leads were waiting more than 24 hours for follow-up, representing significant conversion risk.

Rather than allowing these metrics to sit on a dashboard, BILD challenged teams to identify barriers, improve backup coverage, and build systems for faster response. The distinction matters—because insight without action changes nothing.

Sales Infrastructure Extended Far Beyond Coaching

As the relationship matured, BILD's role expanded into a comprehensive operating infrastructure supporting every dimension of revenue performance.

Recruiting & Talent

Candidate screening, behavioral assessments, sales leadership hiring support, onboarding, and performance coaching for new hires.

CRM & Sales Operations

Pipeline management, database oversight, reporting infrastructure, and CRM adoption accountability across all communities.

Competitive Intelligence

Mystery shopping, competitive analyses, market positioning reviews, and ongoing sales-performance assessments.

Marketing Support

Collateral development, event coordination, digital campaign support, and promotional materials aligned with sales strategy.

Referral Strategy

Professional outreach, resident referral programs, and relationship-building—15 non-paid referrals yielded 5 move-ins (**33.3% conversion**) in one measured 90-day period.

Technology & On -Site Intervention

CRM coordination, AI lead-nurturing platform support, digital partner management, and direct on-site training and leadership engagement.



The Results

Portfolio Occupancy Reached 94.79%

During the 12 months ending July 31, 2026, portfolio occupancy increased across the full six-community portfolio—a transformation driven by consistent execution, not a single campaign.

Starting Occupancy

87.16%

Portfolio baseline—communities hovering in the mid-80s, with some locations in the upper 70s.

Ending Occupancy

94.79%

Portfolio result after 12 months of embedded sales leadership, coaching, and accountability.

Units Gained

+34

Additional occupied units—growing from 475 to 509 across the portfolio. The improvement was not isolated to one location.

A Sales Machine Was Operating Behind Those Numbers

During the July 2025–July 2026 measurement period, the portfolio generated substantial lead volume and meaningful conversion results—demonstrating that [the work of building and sustaining a revenue engine never truly ends](#).

3,972

New Inquiries

Generated across the six-community portfolio in 12 months.

781

Tours Conducted

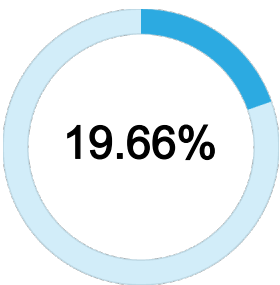
Converting inquiries into in-person experiences.

235

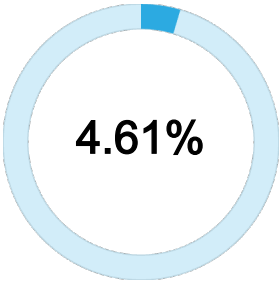
Move -Ins

Total stage-advanced move-ins recorded across the portfolio.

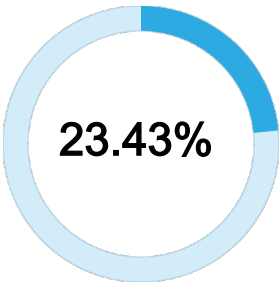
Conversion Metrics



Inquiry -to -Tour



Inquiry -to -Move -In



Tour -to -Move -In

At nearly 95% occupancy, the portfolio still maintained substantial lead volume and measurable conversion opportunities. The focus shifted toward **protecting performance and continuously improving the revenue engine**.

One Month Shows the Model in Action

In May 2026 alone, the six communities recorded **17 move-ins across the portfolio** —including one community that reached **100% occupancy**. But rather than simply celebrating the outcome, the next BILD strategy session immediately examined what drove those results and what needed to happen next.



Measure

Which lead sources produced those 17 move-ins? What contributed most to each community's success this month?



Diagnose

Where could conversion improve? How could professional referrals increase? What barriers slowed performance?



Coach

Build the team's skills and confidence around the specific gaps and opportunities identified in the data.



Execute & Repeat

Turn insight into action. Then do it again the following month—because the engine only performs when it keeps running.

📌 This ongoing cycle—**Measure. Diagnose. Coach. Execute. Repeat.**—became the operational foundation of the entire multi-year relationship.

The Transformation

The greatest result was not a single occupancy percentage. It was the creation of a **repeatable sales operating system** built on deep institutional knowledge—something traditional turnover-prone regional leadership structures struggle to replicate.

Over several years, BILD developed a comprehensive understanding of the operator's entire ecosystem:

People & Culture

Communities, leadership personalities, individual salespeople, hiring needs, and team dynamics across every location.

Markets & Competition

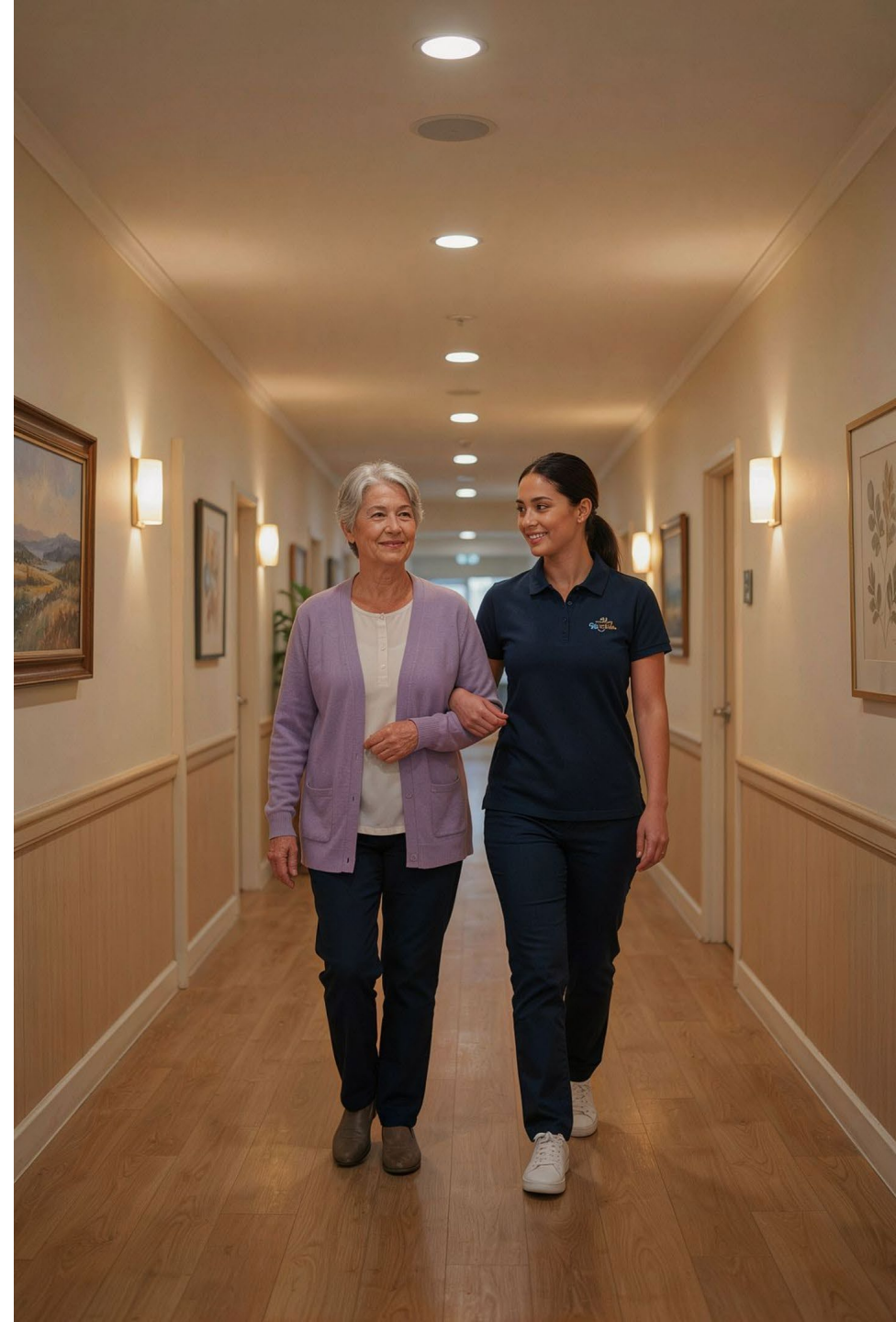
Local competitors, market positioning, pricing dynamics, and competitive intelligence informing daily sales strategy.

Operations & Technology

CRM infrastructure, lead sources, conversion patterns, marketing initiatives, and performance history across the portfolio.

Continuity

Institutional knowledge that persists through personnel changes—delivering the consistency that internal turnover routinely destroys.



Then the Business Changed

After years of operating the portfolio independently, ownership completed a major real-estate transaction and entered a **new institutional ownership structure**. The operator remained responsible for running the communities—but the environment shifted significantly.

New Institutional Expectations

- Greater visibility into performance metrics
- Consistency of execution across all locations
- Predictability in revenue and occupancy reporting
- Accountability structures that institutional partners demand

The Strategic Question

How do you preserve an entrepreneurial culture while creating the performance discipline institutional ownership demands?

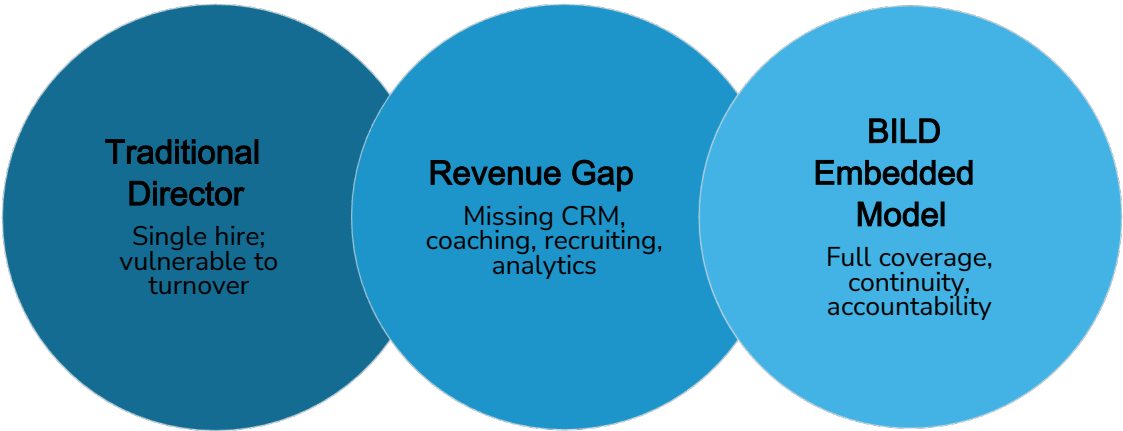
The answer was not to dismantle the sales infrastructure that had produced the results. **It was to evolve it.**

The embedded Revenue Performance model proved flexible enough to serve both the operator's culture and the institution's expectations—simultaneously.



From Consultant to Revenue Performance Office

The engagement demonstrates an increasingly important model for senior living operators. Organizations do not always need to hire every capability internally. A traditional regional sales leader offers valuable leadership—but sustainable revenue performance requires a [much broader set of disciplines working in concert](#).



Building all of these capabilities internally is expensive—and deeply vulnerable to turnover. An embedded specialist team offers continuity, depth, and scalability that a single internal hire cannot match.

-  **Sales Leadership**
-  **Coaching**
-  **CRM & Analytics**
-  **Recruiting**
-  **Competitive Intel**
-  **Marketing Alignment**

The Bottom Line

A multi-community senior living portfolio moved from the **mid-80% occupancy range to nearly 95%** , while building a sophisticated sales infrastructure capable of supporting continued growth and increased institutional accountability.

The transformation wasn't driven by one campaign. It wasn't one salesperson. It wasn't one training session. It came from something far more powerful.

Consistent Execution.

The Right Metrics

Visibility into every lead, every stage, every community—so leadership could act before problems became occupancy losses.

The Right Coaching

Hands-on, individualized skill development that translated knowledge into results—week after week, community by community.

The Right Accountability

A performance culture where data drove action—and where the question was never "what happened?" but "what are we doing about it?"

The Right Infrastructure

A revenue operating system built to perform consistently—not dependent on any single hire, program, or market condition.

The Results at a Glance

94.79%

Portfolio Occupancy

Peak performance achieved across the full six-community portfolio.

+7.63

Percentage Points Gained

12-month occupancy improvement from 87.16% to 94.79%.

+34

Additional Units Occupied

Growing from 475 to 509 occupied units across the portfolio.

3,972

New Inquiries

Generated over 12 months of active pipeline management.

781

Tours Conducted

Converting inquiries into in-person community visits.

235

Stage -Advanced Move -Ins

Total move-ins recorded through pipeline stage advancement.

1,200+

Pipeline Interactions

Documented community-level management touchpoints across the multi-year engagement.

33.3%

Referral Conversion

Non-paid professional referrals converted to move-ins in one measured 90-day period.

What Would Happen If Your Sales Infrastructure Were as Sophisticated as Your Real Estate?

Senior living operators invest millions in buildings, amenities, technology, and marketing. But revenue ultimately depends on what happens *after* the inquiry arrives.

Data doesn't improve occupancy. Execution against the data does.

BILD & Co helps operators build the sales infrastructure required to turn opportunity into occupancy—without relying on one person, one campaign, or one exceptional salesperson.

Growing Portfolio?

We'll build the infrastructure that scales with your growth without letting execution slip.

Changing Ownership?

We'll help you meet institutional expectations while preserving the culture that makes your communities great.

Inconsistent Execution?

We'll create the accountability structures and coaching systems that deliver results across every community, every month.

Build the revenue infrastructure your portfolio deserves.

[Schedule a Strategy Conversation →](#)

About BILD & Co

BILD & Co is a senior living Revenue Performance Office—an embedded, specialist team that works alongside operators to build the sales infrastructure, accountability systems, and execution discipline required to grow and protect occupancy.



Community -Centered Approach

We believe that when sales infrastructure is strong, communities thrive—and the seniors and families who depend on them get the care experience they deserve.



Embedded Partnership Model

Unlike traditional consultants, we become part of your operating team—developing the deep institutional knowledge that delivers continuity and consistency across multi-year engagements.



Results That Scale

From mid-80% occupancy to 95% and beyond—our model is built to produce measurable, sustainable revenue performance across every community in your portfolio.