# Behind Pro Forma?

## How One Life Plan Development Added 42 Net Deposits and Nearly Tripled Visit-to-Deposit Conversion

A luxury West Coast Life Plan community was selling a vision — no building, no tours, no finished lifestyle to experience. With 91 deposits toward a 167-deposit goal and a predevelopment clock ticking, BILD & Co and BILDX stepped in to transform how the sales team worked. What followed was one of the most productive presales runs in the project's history.

CASE STUDY

WEST COAST LIFE PLAN DEVELOPMENT

# The Challenge

A luxury West Coast Life Plan community was preparing for a major new development — but there was one significant challenge: **the community existed primarily as a vision.** With construction yet to begin, the sales team was asking prospective residents to make a meaningful financial commitment to a future lifestyle they could not yet walk through, touch, or experience.

The development entered its engagement with BILD & Co Revenue Growth Coaching and BILDX Revenue Operations Center with approximately **91 deposits toward a 167-deposit goal.** The challenge was not simply generating more leads. The existing database represented significant untapped opportunity — but sales activity, follow-up, and conversion needed to accelerate dramatically.

For a project dependent on achieving critical predevelopment sales milestones, the stakes were high. Pipeline velocity was stalling. Prospects were lingering without clear next steps. The team was working hard but not converting at the rate the pro forma demanded. The mandate was unambiguous: **increase deposit velocity — quickly.**

### Where They Started

91 deposits in the pipeline toward a goal of 167 — with a team selling an experience that didn't yet physically exist.

### The Core Problem

Not a lead volume issue. A conversion issue. The database held real opportunity — but the sales engine wasn't capturing it consistently or quickly enough.

# The BILD Strategy

BILD & Co and BILDX partnered with the existing sales team to address both sides of the revenue equation simultaneously. **BILD & Co strengthened how the team sold. BILDX strengthened the consistency and velocity with which the pipeline was worked.** Rather than simply adding more marketing spend or lead volume, the engagement focused on converting more of the opportunity already sitting in the database.

The approach was systematic and deliberate — building a repeatable sales engine in which every viable prospect was intentionally advanced toward a decision. No more leads falling through the cracks. No more conversations without clear next steps. Every interaction was designed to move the pipeline forward.

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|---|---|
| **1** | **Deeper Discovery**<br>Uncovering real motivation during inquiry conversations — going beyond surface-level interest to understand urgency, preference, and readiness. |
| **2** | **Consultative Selling**<br>Confident recommendations rooted in the prospect's stated needs — not just presenting information and hoping for a decision. |
| **3** | **Objection Handling & Deposit Asks**<br>Coaching the team to address hesitation with confidence and to ask for commitment directly and without apology. |
| **4** | **Pipeline Prioritization**<br>Database segmentation and CRM discipline with clearly defined next steps — so the team focused energy on the strongest opportunities first. |
| **5** | **CallRail Reviews & 1:1 Coaching**<br>Real prospect conversations reviewed in coaching sessions — turning individual sales moments into team-wide learning and accountability. |
| **6** | **Purposeful Lead Nurturing**<br>Structured follow-up cadences that kept prospects engaged and advancing — not waiting indefinitely for self-directed readiness. |

# The Sales Behavior Shift

The sales team already possessed a strong hospitality and luxury-service foundation — the kind of warmth, attentiveness, and relationship-building that prospective Life Plan residents respond to. **BILD's role was to translate those existing strengths into intentional, consultative, and conversion-focused sales behavior.** The foundation was already there. The shift was about channeling it toward outcomes.

In a predevelopment environment, this distinction becomes especially critical. When there is no finished building to sell, no dining room to experience, and no neighbors to introduce, the sales team's ability to uncover motivation, communicate the vision, build confidence, and lead the decision *becomes* the product experience. The conversation is the tour. The sales counselor is the community.

| Before | After |
| --- | --- |
| Checking in without purpose | Creating purposeful next steps |
| Presenting information | Making confident recommendations |
| Waiting for readiness | Asking for commitment |
| Working all leads equally | Prioritizing strongest opportunities |

That shift — from reactive to intentional, from informational to consultative — is what separates a sales team that works hard from one that converts consistently. Both matter. But only one drives deposit velocity.

# The Results

From mid-March through September 10, the community added **42 net deposits** — moving from 91 to 133 and substantially advancing toward its 167-deposit goal. But the raw deposit number only tells part of the story. The most significant result was what happened inside the sales funnel itself: a fundamental transformation in how efficiently the team was converting opportunity into commitment.

**42**

### Net New Deposits

Added from mid-March through September 10 — moving the community from 91 to 133 total deposits.

**55%**

### Visit-to-Deposit

Up from 19% — nearly tripling the rate at which tours converted to committed deposits.

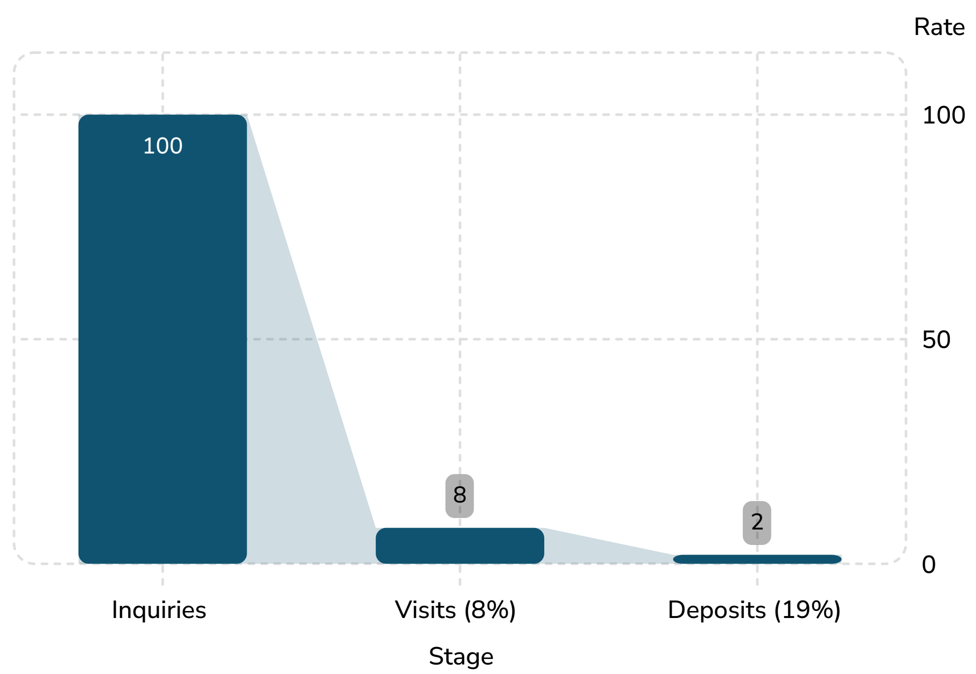
**25%**

### Inquiry-to-Visit

Up from 8% — more than doubling the rate at which inquiries converted to scheduled visits.

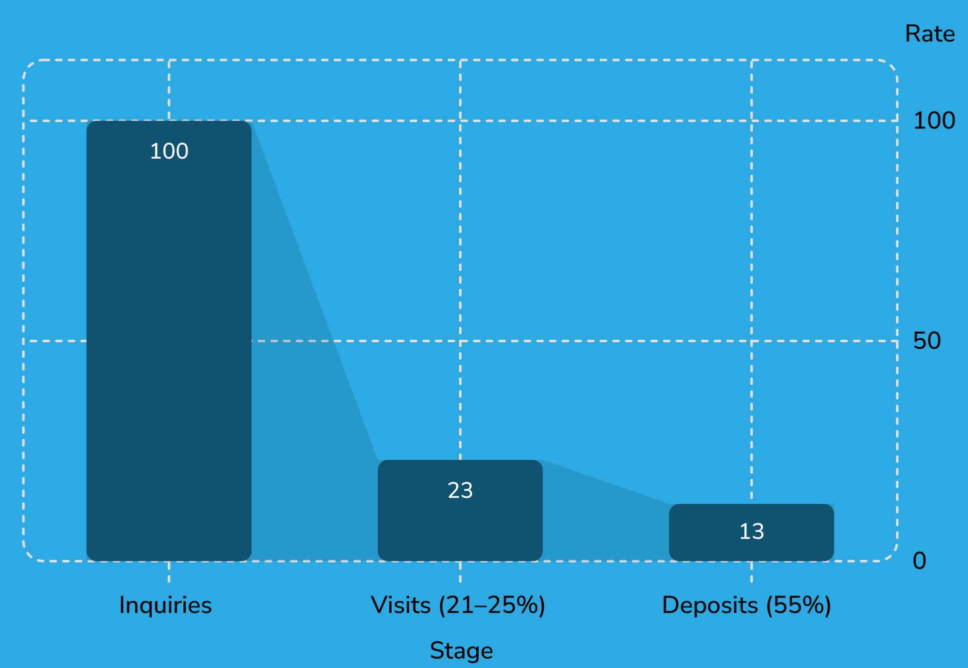
### Conversion Funnel: Before

**2%**
Total conversion rate




### Conversion Funnel: After

**13%**
Total conversion rate




The result was not simply more activity. It was a fundamentally more productive sales engine — one that generated dramatically more output from the same pipeline investment.

# Why It Worked — and What It Means for You

BILD did not replace the on-site sales team. **We amplified them.** The on-site team brought the relationships, market knowledge, and luxury hospitality experience that Life Plan prospects respond to. BILD & Co brought the strategy, coaching, sales methodology, and accountability required to improve conversion. BILDX provided an additional execution layer to maintain pipeline consistency and ensure every opportunity was actively worked — not just tracked.

Predevelopment senior living sales is fundamentally different from selling an operating community. There may be no apartment to tour, no dining room to experience, no residents to introduce, no lifestyle to physically demonstrate. **The sales team must sell belief in what is coming.** That requires a different level of consultative skill, discovery depth, and confident decision leadership than most hospitality-trained teams are initially prepared to deploy.

### More Conversations

Purposeful outreach and disciplined follow-up kept prospects engaged and advancing rather than going quiet.

### Better Discovery

Deeper inquiry conversations uncovered real motivation and urgency — the foundation of every confident deposit ask.

### Stronger Recommendations

The team moved from presenting options to making confident, personalized recommendations that led prospects to decisions.

### Greater Accountability

Defined next steps, CRM discipline, and 1:1 coaching created a culture of consistent, measurable sales activity.

> From 91 deposits to 133. From 19% to 55% visit-to-deposit conversion. 42 net deposits — while selling the vision before the building existed. **That is deposit acceleration.**

If your Life Plan development is approaching a predevelopment sales milestone — or simply not converting at the rate your pro forma requires — the opportunity may already be in your database. The question is whether your sales engine is built to capture it.

Ready to accelerate your presales pipeline? BILD & Co and BILDX partner with Life Plan communities across the country to build the sales systems, behaviors, and accountability that drive deposit velocity — before and after opening day. Email Revenue@BildandCo.com to learn more.