

## Case Study:

**Large CCRC community on the West Coast of Florida,  
multi-building campus, 3 month engagement**

**Susan E., Grow Your Occupancy Onsite Sales Specialist**

*Note: Susan's onsite engagement was extended 90 days. She has currently secured 10 entry fee move-ins which significantly impacts ROI.*

Results in the initial 90 days:

- ◇ 6 entry fee move-ins with a deposit for a 7th move-in
- ◇ **14.8 times ROI\***
- ◇ Sales activities completed:
  - ◇ 70 tours
  - ◇ 938 call outs
  - ◇ 290 connected calls
  - ◇ 481 messages left
  - ◇ 1,616 emails, texts, and videos sent
  - ◇ 801 CRM past-due tasks / no next step completed

*\*Based on entry fee and monthly fees a 12 month stay.*



*"Consistent follow up and engagement with prospects and depositors resulted in improvement in key metrics. Efforts to clean up the CRM are ongoing. After supporting move-ins during the first 2 months, I have discovered some gaps in welcoming new residents and I'm working with the leadership team to improve the new resident experience."*

– Susan E.  
Grow Your Occupancy Onsite Sales Specialist