

WHITE PAPER

Inside Your New Senior Living Sales Playbook

**True Sales Success Stories
— *And Data* — From Two Operators**

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True Sales Success Stories — And Data — From Two Operators

Numbers don't lie. We've heard that before.

In the case of Yardi's new sales playbook, "lead stages," it's not just that the numbers don't lie.

The numbers tell the story of an entirely new world.

A growing number of senior living operators are turning to [Yardi's RentCafe Senior CRM](#) and its "lead stages" approach to sales, a prospect-centered strategy that is more flexible and hence more effective than a standard buying journey. Yardi is also now upgrading [Senior CRM on Voyager 8](#) for even better results.



The conversion rates in Q1 of 2025 using lead stages, compared to a leading CRM competitor, show the difference:

Leading CRM competitor

Inquiry to Tour: **28%**
Inquiry to Move-in: **8%**

Senior CRM from Yardi

Inquiry to Tour: **37%**
Inquiry to Move-in: **9.75%**

**Upgraded Senior CRM
on Voyager 8**

Inquiry to Tour: **40%**
Inquiry to Move-in: **12.02%**

"When we looked at the group that was not using lead stages and then we reviewed the same type of clients that were using lead stages, there was a 10% increase in their leads-to-move-in conversion," says Kristine Schrudder, Senior Consultant at Yardi.

>>>> In this white paper, you will learn:

- How and why Yardi developed lead stages
- A step-by-step guide on how operators can make lead stages their own
- The KPIs showing the respective success of two operators:



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Inside the “Lead Stages” Concept

Why operators like this prospect-centered approach

If you’re still using “hot, warm, cold” to drive move-ins, you’re getting colder, not hotter.

That is a lesson that both SRG and Jaybird have learned, and their conversion and move-in results back them up. Among the most exciting datapoints that these two operators have seen:

- **Jaybird: 8-day decrease** of initial contact to move-in
- **SRG: 92%** inquiry-to-tour ratio

That’s because Yardi works to stand hand-in-hand with operators, not just as a technology provider but as a true partner. The Solana Beach, California-based SRG uses Yardi’s accounting system and values a customer relationship management (CRM) system that integrates with accounting so they can automatically pull accounting reports into the CRM.

“Because let’s just be real: If it’s not an automated process, very few sales managers will change the status in the system,” says Allie Goodwin, Vice President of Sales at SRG. “We wanted a system that was hyperfocused and hypertargeted.”

That’s exactly what Yardi is delivering everyday with lead stages, a system they built with operators in mind.

“We built lead stages in a way that allows operators to configure to best suit their own business needs,” says Candace Seidle, Manager Consulting Practices at Yardi. “That’s the real magic. We built the architecture for clients to put in their own sales playbook and meet their needs, instead of being forced to use a pre-designed system.”

Jaybird Senior Living had the same experience.

“In previous software uses, we had stuck with the industry standard of the hot-warm-cold for lead stages,” says Justin Wray, president of the Cedar Rapids, Iowa-based Jaybird. “With Yardi, we were able to adapt to more of an aligned version of where our users and prospects really are in their journey.”

Yardi’s process is more in depth in its details, he notes. Just considering a lead as “hot” is not actually that specific.

“Every journey is not going to look exactly the same,” Wray says. “We cannot assume that they’re looking to move in within one to two weeks. With Yardi, we’re able to hone in on those details for a more targeted approach in our marketing campaigns and our sales strategies as well.”



Reducing time between stages

↓ **30%**

Perhaps the best benefit of using Yardi’s lead stages is the reduction of time from first contact, or inquiry, to move-in. SRG has seen a 30% reduction in time from inquiry to tour.

Yet a tour alone is not a move-in. For more data on lead pages, turn to [page 4](#).



Inside Yardi's Lead Stages

Tips from Jaybird and SRG

The Yardi system gives operators better vision into prospects by redefining the buying journey through descriptive labels that truly show where a prospect is in the buying process. With access to the system's real-time reporting, operators are not waiting for sales regionals and accountants to reconcile reporting. All departments are on the same page with real-time, accurate reporting.

The beauty of Yardi's lead stages: because they are hypertargeted on prospects, they are also hypertargeted for operators. Yardi starts with a recommendation for operators on the stages.

"We were able to take the recommendations and then make our own adjustments," Wray says.

"But it was nice to at least have the education of where those recommendations came from in the first place. It was from the experience that Yardi has had with other clients and this seems to work well."

For SRG, they built their stages based on the psychology of senior living buyers, tracking the buying triggers and buying turnoffs. "We put all of that into our sales training book," Goodwin says. "Then we took those areas to build these stages."

The system automatically moves a prospect through the stages based on the actions from the prospect, which also trigger a "sales action." SRG tends to use six stages.

When the prospect makes the commitment to move in and becomes a resident, their record is automatically available in the accounting software. The operator can then move that record from the CRM to Yardi Voyager Senior Housing, Yardi's financial accounting system, at the appropriate time.

What's more, lead stages are a leading indicator of occupancy projections. That's an essential benefit for the whole organization.

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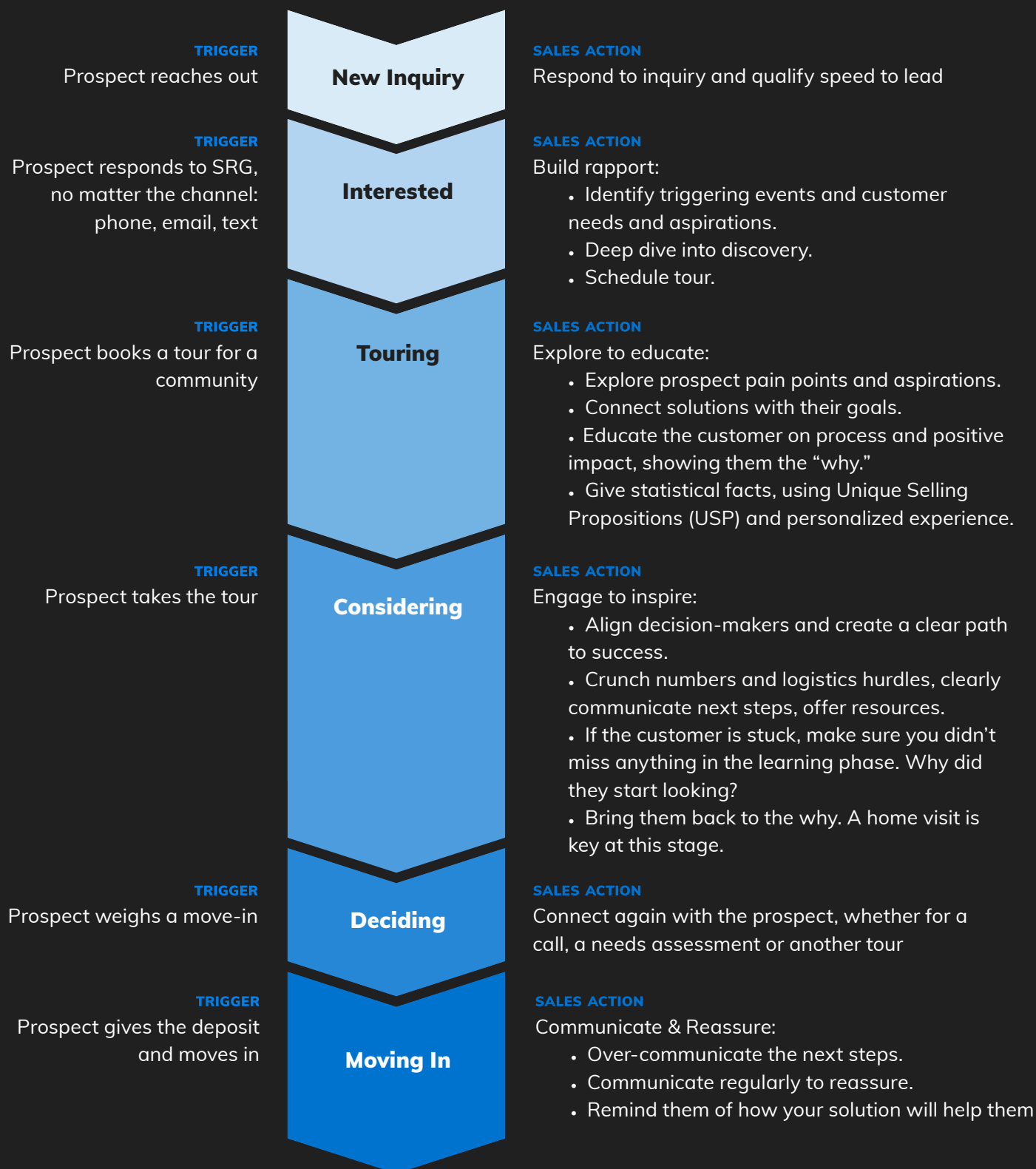
Lead stages have been a game-changer in our marketing. Every single lead that we have gets targeted exactly where they're at in their journey. If you're a new inquiry, you're going to get much different messaging than if you're, say, deciding."

Allie Goodwin
Vice President of Sales
SRG Senior Living



How SRG Senior Living Uses Yardi's Lead Stages

With its lead stages program, Yardi makes recommendations and operators customize. This is an example of how SRG works. Each lead stage is reached via the “trigger” from the prospect, leading to a “sales action” from SRG.





How Lead Stages Impact Marketing Decisions – and Sales Staffing

When sales teams have greater insight into how prospects think, the marketing team benefits too. Operators will market differently to someone they haven't connected with yet compared to those they have. They will market differently to those who toured a community compared to those who made their deposit.

A hot-warm-cold approach can be any of these statuses, preventing teams from tailoring email campaigns and marketing effectively.

“Lead stages have been a game-changer in our marketing,” Goodwin says. “Every single lead that we have gets targeted exactly where they're at in their journey. If you're a new inquiry, you're going to get much different messaging than if you're, say, deciding.”

Examples of how an operator might handle marketing for a prospect who has reached the “deciding” phase:

- **Personalized video message** with an invitation to an event
- **Drip campaign messaging** changes to automate each lead stage
- **Testimonials from residents** with similar concerns prior to moving

The system also helps operators hedge against high staffing turnover, by giving new staff members an easier path forward. Jaybird even pre-populates its media libraries with targeted collateral based on each prospect's stage.

Lead stages create alignment between sales and marketing, and I appreciate that aspect. With Yardi, we're able to demonstrate our shared goals, and then exhibit how we're contributing to those shared goals. I'm able to deliver impactful messaging to guide prospects through their journey. We are focusing on driving the right traffic to the building, getting the right people in for tours. With lead stages, I'm able to really target my marketing campaigns based on where the user is in their journey as communicated by those stages.”

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I sold for years, and I can tell you I can count on two hands how many people I sold without actually touring the community.”

Allie Goodwin

Vice President of Sales, SRG Senior Living



Key partners with lead stages

- + Talk Further
- + Catalyst
- + Active Demand
- + HubSpot
- + OneDay



Top Datapoints Proving the Power of Lead Stages

What Jaybird and SRG have seen

With lead stages, the numbers tell the tale. Operators have seen a shorter time between inquiry and tour, and between tour and move-in. Along with the stats above, other key data points include:

- **Inquiry to tour ratio** is 7 percentage points higher
- **Days between inquiry and tour** is 5.25 days shorter
- **The overall sales cycle** is 9.5 days shorter

Jaybird Senior Living: Q1 2025 vs. Q1 2024

Their average sales cycle from initial contact to move-in is usually 75 days. In 2025, it was 67 days.

Jaybird worked with Yardi to apply that eight-day decrease to a typical portfolio of 35 communities at an average unit count of 120, with an average rent at \$5,000 per month, just to see the potential revenue impact. They found that in that scenario, an operator would see an annual increase in revenue of \$1.65 million.

As for their actual figures, Jaybird has decreased their number of tours yet increased their number of move-ins. That's because they are doing a better job of targeting the right prospects.

SRG Senior Living: Big Boost in Tours:

As with Jaybird, the lead stages impact has been massive for SRG.

Their inquiry-to-tour ratio is usually at 75%. In March 2025, it was 92%.

They estimate that about 30% of their move-ins likely would not have moved in as quickly without lead stages.

In January 2025, SRG had their highest January for move-ins in eight years.

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For us, it's comforting to at least see that number of move-ins across the portfolio spike. It says that we are focusing on driving the right traffic to the building and getting the right people in for tours. The lead stages have helped because we're able to really target my marketing campaigns based on where the user is in their journey as communicated by those stages.”

Justin Wray
President, Jaybird



Digging into the Data, One Prospect at a Time

For SRG and Jaybird, the future of senior living sales is now.

“It’s shortened our follow-up times to the lead stage, and our associates feel that they’re up to speed much more quickly,” Goodwin says. “We’re finding better engagement.”

Adds Wray: “We can provide prospects with more because we have more information about them. We’re not just saying, ‘This is a cold lead.’ We’re able to actually say, ‘This is where this individual is in their journey.’ We can tell when they’ve decided and might just need that final push for a move-in date. That transparency of information from Yardi makes that happen.”



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