

# Case Study: Streamlining Sales and Increasing Staff Efficiency Through Customer Relationship Management Technology



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## Categories:

- ◆ Staff Efficiencies
- ◆ Cost of Care and Return on Investment (ROI) to Providers

### About the Organization

**Organization Name:** Stage Management

**Main Contributor:**  
Troy McClymonds, Partner

**Organization Type:** Senior Housing Operator

**Organization Description:**  
Founded in 2016, Stage Management is a senior housing operator that puts its employees and residents first. Stage Management currently oversees the Golden Pond Retirement Community, a full-service retirement and assisted living community in Golden, CO. With 115 units, Golden Pond has offered housing, personal care, and other senior services since 2004.

## Project Description

Stage Management shortened its lead response time 12-fold using Yardi Senior Customer Relationship Management (CRM), a sales and marketing solution designed for senior living providers. By adopting Senior CRM and standardizing on a central database, staff eliminated paper-based processes and improved communication between staff. Stage Management is now tracking hundreds of leads at a time. Overall, the senior living marketing solution has helped increase the average occupancy rate by 7%.

## System Type

Customer Relationship Management

## Business Model

Private Pay

## Implementation Approach

Due to time lost in paperwork, the staff at Golden Pond realized they needed an electronic solution for their community. After a careful review of multiple vendors, the team settled on the Yardi Senior Living Suite.

“The biggest selling point for me was that Yardi has it all. Other companies try to piecemeal everything together. They’re spitting things out into a spreadsheet trying to make it all work,” said Troy McClymonds, partner at Stage Management. “With Yardi, the whole package was there.”

The Yardi Senior Living Suite replaces disparate systems with an integrated software solution for assisted living. With Yardi Senior CRM, built into the Yardi Senior Living Suite, providers gain complete visibility into their sales and marketing efforts. And thanks to its centralized database, redundancies are eliminated, allowing lead data to reach the departments that need it most in real time.

## Advantages to the Approach

For Stage Management, Senior CRM has made a big difference.

“How seamless it is, from starting as a prospect to becoming an actual resident, is amazing,” said McClymonds. Staff no longer need to re-enter names and other previously recorded details, or search through paper files. “We just put everything into Yardi, and it continues on through the cycle.”

## Outcomes

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Thanks to Yardi Senior CRM, Stage Management has streamlined sales workflows, increased staff efficiency, and ultimately grown its community.

### Time savings

With Yardi as the single source of truth for lead and resident information, Stage Management saves hours throughout its sales cycle. Staff enter prospect details within the system, and those records are immediately available in real time. McClymonds estimates that they save at least 4-6 hours per lead.

“With Senior CRM, it’s a lot less work for everybody,” he said.

### Fewer paper pileups

Before Yardi, Stage Management was using thousands of yellow cards for prospect records. Now, every lead is captured in Senior CRM with full contact details, addresses, medical history, and personal information. In total, Stage Management has eliminated 75-100 different types of paper documents across their organization.

### Clearer lead tracking

For Stage Management, one of the biggest advantages of Senior CRM was the added visibility. It now tracks about 250 to 300 open, active leads in its system, and McClymonds appreciates the insight into the current sales stage.

“We’re doing a better job of touching all of those prospects and seeing where they are in the sales cycle,” he said.

### Faster outreach to lead

Once a lead enters Senior CRM, the system automatically sends an email to the sales team. This convenience has shortened the response time for sales counselors at Stage Management. They now contact new leads within 2 hours. Before, responses typically took a full day, and even longer over the weekend.

### Higher occupancy

The overall improvement in staff efficiency and sales management has had a real impact on Stage Management’s census numbers. Its historical average had always been around 90% occupancy. Now, with Yardi, it hovers in the 93-100% range.

“I couldn’t imagine doing this without Yardi. It’s invaluable,” said McClymonds.

## Challenges and Pitfalls to Avoid

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We considered leveraging another platform specifically to handle leads and marketing. In retrospect, I would not recommend this. CRM provides a streamlined database that saves significant time, and nothing gets lost in translation. The thought of having to re-key all the intake info into another system is daunting.

## Lessons Learned

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Again, our process was archaic at best. There was no real organization to any of our leads. Everything was based on gut feelings and guesses. We can now quantify our entire lead generation process and it shows in our numbers month over month.

## Advice to Share with Others

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Keeping your leads on paper or another system is a mess. Take the leap and you won’t ever look back.