

How do you | excel with senior living technology?

Get practical advice from leaders in the senior living industry

SPEAKING FROM EXPERIENCE

Today's senior living providers have their work cut out for them.

From occupancy rates to resident safety to industry-wide challenges are pressuring executives, administrators and caregivers to take new steps. Fortunately, you don't have to go it alone. Leaders across the country have already forged strategies for success, embracing new ideas and technologies.

For this white paper, we interviewed these forward-thinking professionals to gather their insights, knowledge and advice. What follows is a compilation of their answers. Learn how these leaders tackled the same challenges you face — and discover how to put their solutions into practice at your communities.

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Featured senior living leaders



Breck Austin

Senior Operations Executive

With over 20 years in senior living, Breck Austin is an industry veteran. He has developed, managed and deployed procedures for multiple organizations as a leader of operational services. His background also includes extensive experience in senior accounting positions.



Dave Eskenazy

Chairman of the Board

Dave Eskenazy has served a wide range of executive roles in senior living, including president, CFO and chairman of the board. He's a self-proclaimed data nut and a team leader who drives collective success through a focus on people, skills, creativity and strategic thinking.



Dennis McCarthy

Chief Information Officer

Nearly two decades ago, Dennis McCarthy helped start Superior Residences, the precursor to [SRI Management](#). Dennis now ensures that team members and families can generate the information they need, whenever they need it, to provide the best possible care.



Nicole Graham

Licensed Administrator

With close to a decade in facility administration, Nicole Graham creates opportunities for seniors to live well at [Silver Sky](#), an affordable assisted living community managed by the nonprofit Nevada HAND. Previously, she was the community relations director for Emeritus Senior Living.

How do you | encourage move-ins?

“THE BEST THING YOU CAN DO TO MAXIMIZE LEAD CONVERSION IS BE TIMELY.”

Dave Eskenazy

When a lead comes in, you have to know and act on it as quickly as you can. So, having a system that identifies those leads, alerts you to leads coming in and tells you where they came from is essential.

I've spent a lot of time evaluating that, because where people spend their time is critical. But all leads aren't created equal. You can't spend as much time on every single lead as you do on every other lead. It's really important to be efficient and effective so that you understand the leads, where they came from and how you should prioritize them.

One of the ways I've helped teams respond to leads quicker was by obtaining information entered on the internet, which can flow directly into [RENTCafé Senior CRM](#). Having that information quickly enables sales to act. It's a critical feature, and it is instrumental for lead response times.



**IDENTIFY
LEAD SOURCES**



RESPOND QUICKLY



**ACCESS
INFORMATION INSTANTLY**



“KNOWING THE FINE DETAILS HELPS MAKE PROSPECTS FEEL MORE AT HOME.”

Nicole Graham

It's always ideal to know how close a lead is to moving in. Some leads are two months out. Some are three months out. Some are years out. Understanding that allows us to input a call-out in two years maybe or a follow-up that works for them. We're not that typical marketing person who's going to bombard them every week.

A lot of leads will come to us when they are ready. But having that data and knowing who spoke to them last and where they left off has been great. It's about continuing that customer service and building a bond that for some started with us a year ago. Tracking personal information in our CRM has been really great for those families. They're shocked sometimes at some of the notes that we're able to keep track of. They're like, "Wow, you remember that?" And of course, it's all in our database.

With technology, our staff can be more responsive. You know what people like, what they dislike. So, when the resident moves in, they're going to feel a little bit more of that care. It's a big transition for every resident moving in, and sometimes those little things just make the experience easier for all.



FORECAST MOVE-INS



**RECORD PERSONAL
DETAILS**



EASE THE TRANSITION

“IF YOU'RE NOT READY TO EXECUTE WHEN THEY'RE READY, YOU LOSE AN OPPORTUNITY.”

Breck Austin

The CRM is the first touch point for those moving into communities. It allows you to start the resident record and store all of the information pertinent to that prospect in one place. And then it lives there through the life cycle of the sales activities.

From the prospect's point of view, the sales process has greatly improved thanks to electronic workflows. Being able to communicate a proposal directly to the resident in real time and complete it with electronic signatures makes the presentation very professional. And that goes a long way when you are making a life decision to move into an assisted living community or an independent living community.



**STORE DATA IN
ONE PLACE**



**SIGN LEASES
ELECTRONICALLY**



BE PROFESSIONAL

How do you | keep families connected?

“ONLINE PORTALS KEEP FAMILIES AND RESIDENTS IN TOUCH.”

Breck Austin

People need access to everything, and the ability to provide it through online portals with [RENTCafé Senior Living](#) is perfect. There's instant communication when something's going on at a community.

Resident portals are a one-stop shop for residents and family members to be able to access information from billing to programming to work orders. They can make sure that they are getting the services that they are paying for. And that ensures you create value to the resident and to the family.

From a family's perspective, they need connectivity. And the portal allows that. Family members know what's going on at any moment in the day of that resident. If you don't have an online portal you're missing out on valuable communication. It's a great way for family members to stay in touch even with a caregiver.



SHARE COMMUNITY NEWS



ENABLE ONLINE SERVICES



BUILD CONNECTIONS

“REAL-TIME WORK ORDERS GIVE VOICES TO FAMILIES.”

Nicole Graham

The online portal has been great for family, staff and residents. It's really easy to show families how to utilize it, pay their rent and create work orders. Families realize when they're at home: "Oh, I forgot when I was visiting Dad. His toilet seat was wobbly." They can input a work order right there at that time.

It's really helped with communication. Being a 24-hour building, it's difficult sometimes to see families after hours. We needed a communication line to get work orders entered. The portal allows that visibility for families. It makes our job easier, and families feel their loved ones get the care that they need. It's really been beneficial overall.

The maintenance individual gets the orders in real time on his phone as well. It populates right there, which is great, because then maintenance can tackle it and determine the importance. If it's an emergency, he's going to be able to see it in real time and get to it right away.



EDUCATE THE FAMILY



EMPOWER 24/7 REQUESTS



PRIORITIZE TASKS IN REAL TIME

How do you | improve resident care?

“MOBILE POINT-OF-CARE CHARTING CHANGES THE STAFF’S APPROACH.”

Dennis McCarthy

Very often in the course of a day, a caregiver can be involved in a lot of things. They get very wrapped up taking care of one resident after another, and all that charting has to be done. If they’re stopping between everything to chart, then their routine gets broken up, and care gets broken up. Some things can be forgotten or misremembered.

By electronically charting as they go along, it cuts the background stuff out of the process of taking care of a resident. All of the time that they would spend trying to figure out when to chart and what to chart is gone. They just automatically do that with their tablets on the fly.

Their whole flow becomes a lot better. I honestly believe that they’re more efficient as staff members now than they were in the past, because they can just tap and go as they work through the routine of the day.



REPLACE PAPER PROCESSES



CHART ON THE GO



KEEP STAFF FOCUSED

“BECAUSE ASSESSMENTS ARE ALL WITHIN THE SYSTEM, IT’S EASY TO UPDATE SERVICE PLANS.”

Dave Eskenazy

One of the most important ways you can ensure superior resident care is to make sure you understand completely what the condition of a resident is — and how and when that condition changes. Through Yardi EHR and assessment data, you can capture in great detail every element about a resident’s condition.

You take that, and you turn it into service plans. But one of the things Yardi really helps with is understanding when those service plans become stale. Caregivers can make notes and chart changes, and the nursing staff can keep current with assessments, so all those changes make their way through into the service plans. Because the service plans are really the key to making sure that residents are being well taken care of.



CAPTURE ACUITY ELEMENTS



REASSESS RESIDENTS



REFRESH SERVICE PLANS

How do you | increase business efficiency?

“DOCUMENT EVERYTHING IN A WAY THAT EVERYBODY CAN SEE IT.”

Dennis McCarthy

The core of efficiency is being able to communicate that a resident needs something, that something came up on the last shift that the next person should know. It makes the team not only more efficient, but they feel more confident about the delivery of their care. So does the resident. So does the family. Reducing the administrative busy work gives people more time to focus on what we need them to focus on, which is taking care of the resident.

Integrating a system just makes everybody work together a lot more efficiently. When you use something like [Yardi eMAR](#) and EHR in a system that’s tied together, all that integration is already done. Once you put one thing in, everyone knows that everybody has it, and we can all act on it.

There’s no break in the care because of “I’m looking for something” or “I needed this.” Integrating the software pieces lets us know we’ve got the right resident, the right Social Security number, the right medication. We know we’re doing the right thing. That integration is very, very important to the efficiency of the staff.



**STRENGTHEN
INFORMATION SHARING**



**RECORD CARE
PROGRESS**



**STREAMLINE
WORKFLOWS**



“EARLY DETECTION OF PROBLEMS AND KNOWING WHERE TO LOOK IS CRITICAL.”

Dave Eskenazy

Having a single solution stack of technology enables me to house every piece of information I could possibly have about a company, from financial statements to prospects and sales through EHR to acuity. Every key metric we need for business becomes captured inside one ecosystem.

I've taken that information, and I've repeatedly mined it. I use so many analytical tools, but it all starts with having the right data in a single place. So, by spending less time manipulating data and trying to find financial and non-financial information, I am better able to quickly evaluate the business.

One of the most important elements is to make sure I can oversee when the operation is running efficiently. I lay out that information in business metric form so I can see at early stages if an operation is moving in the wrong direction. And that way, I can identify those areas with the team, which enables much, much more efficiency.



CAPTURE KEY METRICS



ANALYZE EVERYTHING



SPOT WARNING SIGNS

“YOU HAVE INTEGRATION FROM ONE SYSTEM INSTEAD OF BOLTED-ON SOFTWARE.”

Breck Austin

The ability for families and residents to access their accounts and pay their bills in online portals directly reflects in financial forecasts. Having an integrated system, where bills are set up and you know what that revenue stream is going to be, allows you to forecast more accurately and project revenue, NOI and expenses.

The lead tracking in CRM ties to your financials as well, helps you analyze your costs per lead. That full integration is key for not guessing at what's being expensed versus what's being tracked. It allows transparency into your efforts.

That integration also helps to catch situations that may have been classified incorrectly on the CRM side. It's checks and balances. Those analytics wouldn't be possible if you manually have to estimate using multiple spreadsheets and charts.



WORK ON ONE PLATFORM



INTEGRATE WITH ACCOUNTING



VERIFY DATA ACCURACY

How do you | achieve the same success?

Along with the strategies for success these leaders have shared, you will need the right technology to lay the foundation for growth. At Yardi, our mission is to provide clients with superior products and outstanding customer service. The [Yardi Senior Living Suite](#) unites property management, finance, marketing and resident care on a single platform.

See how Yardi can help your community navigate the next generation of senior living.



GET IN TOUCH



Yardi.com/SeniorLiving or call **(800) 866-1144**

