How did Stage Management increase their speed to lead 12x?

See how Yardi Senior CRM helped this senior living provider eliminate paperwork, accelerate its sales cycle and boost its occupancy rate.

4-6 hours saved per lead	**75+** document types eliminated	**250-300** leads tracked at a time	**12X** faster lead response time	**7%** increase in average occupancy rate

"With Yardi Senior CRM, we can see where we are in our sales cycle and what activities we need to complete to help move more people in the door. Our numbers prove that over and over again."

Troy McClymonds
Partner
Stage Management

THE
COMPANY

"Our residents aren't just numbers. We know everybody by name."

Troy McClymonds
Partner
Stage Management

Family owned and operated in Centennial, Colorado, Stage Management is a senior housing provider that focuses on two key elements: its employees and its residents. The company has made it a goal to foster open communication and stronger relationships, and in the process, help staff and caregivers understand the value they provide.

Stage Management currently oversees the Golden Pond Retirement Community, the first and only full-service retirement and assisted living community in Golden, Colorado. With seven acres and 115 units located conveniently close to downtown, Golden Pond has been providing housing, personal care and other senior services since 2004.

They take pride in keeping their buildings modern while ensuring a welcoming feel for residents and visitors alike. "Care comes first. Golden Pond is for seniors, but it's somewhere that everyone would stay," said McClymonds.

CHALLENGE & SOLUTION

THE CHALLENGE

At Golden Pond, staff relied on a paper-based process to manage their lead-to-resident cycle. When new prospects would walk in the door, front-desk staff would hand over cards to capture contact information and then leave the cards with marketing. "From there, they would write notes on the back," said McClymonds.

The amount of handwritten paperwork involved meant that staff spent extra time sorting and disseminating information. As a result, the sales team might take more than a day to respond to new leads, and there was little coverage on weekends unless the front desk called a sales counselor.

The process could be slow once a prospect decided to join the community too. New residents received forms where they were asked to share similar information repeatedly, which made the move-in process less efficient. "There was a lot of duplicate work," said McClymonds.

THE SOLUTION

Due to the lost time, McClymonds and 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" said McClymonds. "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.

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."

THE RESULTS

"With Yardi Senior CRM, it's a lot less work for everybody."

Troy McClymonds
Partner
Stage Management

Thanks to Senior CRM, the paper trail is now just a memory for Stage Management. The mobile, browser-based platform has streamlined sales workflows, increased their staff efficiency and ultimately helped grow their community.

4-6 HOURS SAVED PER LEAD

TIME SAVINGS

With Yardi as the single source of truth for lead and resident information, Stage Management saves hours throughout their 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 four to six hours per lead.
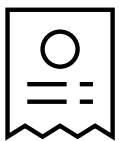
75+ DOCUMENT TYPES ELIMINATED

FEWER PAPER PILEUPS

Before Yardi, Stage Management was using thousands of 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 to 100 different types of paper documents across their organization.
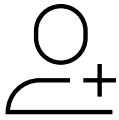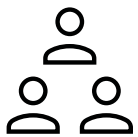
CLEARER LEAD TRACKING

For Stage Management, one of the biggest advantages of Senior CRM was the added visibility. They now track about 250 to 300 open, active leads in their system, and McClymonds appreciates the insight into their 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.

250-300 LEADS TRACKED AT A TIME

FASTER SPEED 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 two hours. Before, responses typically took a full day (and longer over the weekend).

12X FASTER LEAD RESPONSE TIME

HIGHER OCCUPANCY

The overall improvement in staff efficiency and sales management has had a real impact on Stage Management's census numbers. Their 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.

7% HIGHER AVERAGE OCCUPANCY

Yardi Senior CRM boosts revenue and maximizes occupancy with mobile-friendly marketing tools specifically for senior living providers. See how Yardi can help your community grow.

GET IN TOUCH