How does Vitality Living achieve more with the Yardi Senior Living Suite?

Vitality Living streamlines workflows, saves time and empowers staff with the Yardi Senior Living Suite.

Manual processes eliminated	Hours gained back across teams	Community trends unlocked	One source of truth guaranteed

"We use Yardi as our source of truth for everything."

Nick Byrd
Chief Financial Officer
Vitality Living

THE COMPANY

"It all rolls right back down to the resident, every time."

Syndell Lawhon
Vice President of Wellness
Vitality Living

Specializing in independent living, assisted living and memory care, Vitality Living offers residents a premier experience based on their wants and needs. Headquartered in Brentwood, Tennessee, their mission is to create vibrant communities where residents, families and team members can be themselves, live purposefully and experience a profound sense of belonging.

Vitality's team includes seasoned retirement living professionals who are passionate about creating vibrant communities for older adults, regardless of physical or cognitive challenges. They strive to eliminate labels that reinforce stereotypes of aging, to empower choice and to create environments where all residents are successful.

With over 200 years of experience, Vitality's leadership firmly believes that the industry must evolve and change to more skillfully meet the wants, tastes and demands of the older adults of the future. Every team member is inspired to reimagine the experience of older adults living in a community setting. They challenge every perception, advocate for choice and reject the status quo.

Vitality Living on Senior Living Suite

THE CHALLENGE

"We had all these disconnected systems before, so we couldn't tell how things flowed over and things didn't flow over in real time. People were confused and there was a lot of manual overhead."

Nick Byrd
Chief Financial Officer
Vitality Living

For financial accounting, Vitality used to rely on manual processes and disparate systems — taking time away from priorities, generating errors and causing confusion among teams. From monthly ACH pulls to building financial reports, key tasks became increasingly arduous. Vitality searched for a dependable, integrated solution to serve as their source of truth and alleviate the challenges they were facing.

In terms of gathering data and presenting insights, Vitality also utilized manual processes — as their data was scattered across siloed solutions. Not only were these processes time-consuming, but they also prevented Vitality from unlocking insights regarding occupancy, falls and more, since data lacked the organization and presentation needed to reveal important trends. Not to mention, Vitality's data wasn't being updated in real time. Leaders

sought a business intelligence solution that would present up-to-date, business-wide data in a visual format — all in one place.

After searching for a trusted technology provider known for creating integrated, dynamic solutions, Vitality began their journey with Yardi. Now, they're driving success at every level with Yardi Voyager Senior Housing and Yardi Senior IQ.

THE SOLUTION

Prior to implementing Voyager Senior Housing and accompanying tools in the Yardi Senior Living Suite, Vitality used a mix of siloed technology and manual processes. The lack of a single connected solution — built to unite all data and workflows in one place — meant Vitality didn't have true visibility or a reliable method for retrieving important information. "We had all these disconnected systems before, so we couldn't tell how things flowed over and things didn't flow over in real time," shared Nick Byrd, chief financial officer at Vitality. "People were confused and there was a lot of manual overhead."

By moving forward with Yardi, Vitality now has a single source of truth — a solution that integrates all aspects of its business into one database. Long gone are the days of digging through disparate systems and manually transferring details. With Voyager, Vitality accesses automated accounting functions, real-time reporting and complete business oversight in one centralized location. "When you're running a report in Voyager, you're getting real-

time data," said Byrd. "The system is integrated with all of these pieces which allows us to get a true picture."

With Voyager automating tasks Vitality previously did manually, errors have been eliminated across the board. "When we would run our monthly ACH pulls in the old system, the community's business director would have to prepare the file, send it to accounting and we would manually enter all the ACH transactions, and update the amounts," explained Byrd. "You can only imagine what kind of errors that could create, and it created a ton."

As Byrd said, "Fast forward to Yardi, we don't need to do that." Voyager captures all financial data and resident records automatically, removing the opportunity for duplicate data entry and associated errors. This also creates visibility for Vitality across the financial, care and operational aspects of its business. "That visibility piece, which we did not have before, has been tremendous for us," explained Byrd.

Vitaly also said goodbye to time drainers when they partnered with Yardi. Since Voyager acts as their complete general ledger system, Vitality has drastically reduced time spent on key financial accounting tasks, allowing team members to shift and focus on other priorities. "When I started, the amount of people joining our finance calls was 17 or 18, and now it's 13," explained Byrd. "That reduction is related to the transition to Yardi." Byrd shared how moving to a single connected solution has given Vitality's teams days back in their monthly schedule. "We gained two days back just around the ACH process," said Byrd. "It was a manual lift before, but now things are getting updated in real time."

Thanks to their success with Voyager, Vitality chose to move forward with Senior IQ and additional solutions including RentCafe Senior Living Portal, Yardi EHR, Yardi CheckScan and Yardi Aspire. Having integrated tools helps Vitality power its business at every level and in turn, create a better experience for residents. "We love the integration," shared Byrd.

Vitality Living on Senior Living Suite

Before implementing Senior IQ, Vitality didn't have a seamless method for capturing and gathering important data. "Prior to us coming to Yardi, with the system that we used before, we couldn't pull any of that data," shared Syndell Lawhon, vice president of wellness at Vitality. "We had to do things manually." Manually pulling metrics and organizing insights, they were limited to sharing only numbers with staff, owners and investors. Now with Senior IQ, Vitality has a visual representation of the same information — via custom graphs and tables — housed in one secure location. "Nurses are very visual people," explained Lawhon. "When they can see the numbers in a graph pulled right up in Senior IQ, it clicks so much faster. Numbers on a piece of paper are not as powerful."

"Senior IQ makes the numbers real to people," continued Lawhon. Not only is Vitality's data now presented in a visual format, allowing teams to interpret insights with ease, but that data is also readily updated and centrally stored — ensuring accuracy and equipping leaders to get fast

answers to specific questions. "I push a button and then I have the graph I need," shared Lawhon. With intuitive dashboards, graphs and tables revealing trends that Vitality wasn't previously capturing, leaders are gaining insights that move the needle like never before. "A trend is telling you something," shared Lawhon. "There's so much information in Senior IQ that you can dig into. There's always something we're finding on a daily basis — something else we know we could use."

With the ability to access real-time data in Senior IQ, Vitality can make informed decisions regarding occupancy, care, staffing and revenue. "I'm in Senior IQ almost every day," explained Lawhon. "If we have a community that seems to be trending up in move-outs, I can get in there faster and say, 'Could we have done a better job at move-in?' We turn that around before it becomes a long-term trend that really hurts our occupancy."

Touching on the power of good data in relation to care, Lawhon shared,

"The data helps us reassess what the community is doing, and see if our assessments are really accurate. If a resident was not assessed correctly, then the care we're telling our staff they need is not correct. It all rolls right back down to the resident, every time." With staffing, Senior IQ helps Vitality pinpoint when issues are occurring and make scheduling adjustments accordingly. "Looking at trends, if most of our falls occur on second shift, we can ask, 'Do we have the right level of staffing at bedtime, and do we have the care spread out correctly among the staff members?'" said Lawhon. "When you see those trends going up and down, that leads you to look at other things to fix that."

Vitality also captures revenue specifics with Senior IQ, equipping leaders to reallocate resources as needed. "If you're capturing revenue, it allows you to add that extra staff member if you need to — you can justify it," said Lawhon. "Then the care for every resident in that community just gets better." In another example related to revenue-driven decisions, Lawhon explained,

"If the data shows we've had a lot of higher-acuity residents move out, then we go back to our sales team and say we have the ability to bring in some higher-acuity residents. That way our revenue stays neutral."

By giving care staff the tools to visualize important trends for falls, infections and more — Senior IQ also helps Vitality empower those individuals, which boosts retention as a result. "Senior IQ helps us with nurse retention," said Lawhon. "When you start getting data and looking at the bigger picture — how you can make things better for the whole community — not only does it make you feel empowered, it also elevates your skill set." With staff seeing the specifics of how their community is operating, and knowing how

to make improvements, Vitality's residents reap the benefits. "Not only have we affected the residents' direct care, we've also affected the resident by increasing longevity with our staff," shared Lawhon.

Vitality also left data digging in the past when they implemented Senior IQ. Instead of searching through siloed solutions and manually compiling insights to send to owners and investors, Vitality now unlocks actionable information at the click of a button. "I can go in Senior IQ and in two seconds, I'm able to pop information right out for that community and send it right along," shared Lawhon. When it comes to sharing data with community teams, Senior IQ helps staff members avoid digging for what they need, too. Staff

can now find data instantaneously and then apply that knowledge to deliver better care. "I want my regional nurses to spend their time analyzing the data and making a difference, not working on getting the data," explained Lawhon.

Best of all, the expedited workflows don't compromise quality. The easily-accessible, detailed data captured in Senior IQ is reliable every time — and it includes visuals. "I can go in Senior IQ, filter for what I want and there it comes on the screen," said Lawhon. "Before, I'd be using a calculator to manually do things, and I would still just be sending numbers."

THE RESULTS

"It's so wonderful — things that used to take me forever, I can do so fast now."

Syndell Lawhon
Vice President of Wellness
Vitality Living

The Yardi Senior Living Suite helps Vitality Living unify operations and deliver exceptional resident care — all from one platform.

MANUAL PROCESSES ELIMINATED

INTEGRATED TECHNOLOGY

With solutions that unite on a single platform, Vitality is no longer hand-keying information and manually building reports — and leaders no longer worry about mistakes slipping through the cracks. Replacing manual workflows with a single connected solution means every piece of information Vitality needs is accurate, comprehensive, readily updated and centrally stored.

HOURS GAINED BACK ACROSS TEAMS

TIME SAVINGS

Time-consuming manual processes are a distant memory for Vitality. Thanks to Yardi, daily workflows are now automated, allowing Vitality's teams to work more efficiently and focus on priorities. No more devoting hours to digging for answers, taking time away from improving resident services. With major time savings both on the leadership level and for community staff, residents are receiving the time and care they deserve.

Vitality Living on Senior Living Suite

"There's a tremendous amount of benefit with Yardi — having one landing place where we have access to all these different modules."

Nick Byrd
Chief Financial Officer
Vitality Living
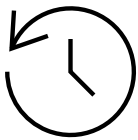
COMMUNITY TRENDS UNLOCKED

REAL-TIME INSIGHTS

Both Voyager Senior Housing and Senior IQ house real-time data in one secure location, allowing Vitality to view key insights at the click of a button. With Senior IQ in particular, Vitality has unlocked numerous new trends to date — through customized dashboards built for their exact needs — which helps leaders make informed decisions regarding staffing, occupancy and more.

ONE SOURCE OF TRUTH GUARANTEED

UNWAVERING CONFIDENCE

Since Yardi is a single-point solution that serves as Vitality's source of truth, leaders now have the confidence to build success in new ways — and make thoughtful improvements that benefit staff and residents alike. The discrepancies, errors and risks associated with siloed solutions have been eliminated entirely, which in turn, empowers everyone at Vitality to work smarter.

Everything is united on a single platform — that's the Yardi Senior Living Suite. Don't wait to set your success in motion.

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