



REVENUE/OCCUPANCY
PROBLEM

Self Diagnosis TOOL

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SALES

- There are no daily sales meetings
- You use placement agencies
- You are ONLY focused on your connections with hospitals/skilled nursing
- You use a tour scheduler company
- You do not have or use a CRM appropriately
- You do not use a visual planning board for proactive sales (Never heard of this? Ask us!)
- You do not have a formal sales training process
- You do not have clear accountability and expectations for our sales team
- Leadership is not involved in the sales process daily

BUILDING

- Your parking lot is not clean with available guest parking
- The first 10 feet of your building doesn't impress
 - Is it clean?
 - Is it professional looking?
 - Is there a warm and friendly staff member?
 - Is there clutter, grocery carts or walkers lingering in the lobby?
- Your homes/units are not tour ready, clean and presentable
- There are things throughout your community in need of repair or replacement
- Your building overall is not kept clean
- You have not toured your building with other team members to get another perspective

BACKDOOR

- You experience move outs within 3-4 months of moving in
- Your residents move only during a health crisis
- Respite stays rarely commit long term

EXPENSES

- Does your labor reflect the active care plans?
- Are labor expenses looked at daily?
- What does your Over-Time look like daily/monthly?
- Are you holding your team members accountable to a budget?
- Are you able to beat or exceed the budget?
- Are expenses being captured in the month incurred?

IF YOU ANSWERED "YES" TO 2 OR MORE, CALL US. WE CAN HELP.



PRICING

- You/sales complete a competitive analysis for pricing monthly or quarterly
- You struggle to communicate what makes you different from the competition
- You use incentives to get seniors to move in
- Can your marketing team explain pricing in 30 seconds or less?
- Your team is confident about the value that the team is providing

CULTURE

- Your team is not unified 'toward two clear' goals i.e.:
 - 1 Serving Residents
 - 2 High Occupancy
- Staff often fight/argue with one another
- Staff and residents are not friendly with one another
- Do your staff know and use residents' preferred names?
- Do staff care about residents' well-being?
- Your team lacks accountability with each other

MARKETING 101

- Your marketing materials do not showcase all that is included
- You are not doing public events that invite guests in to see your community
- You are not offering resident driven private referral events
- You spend 5+ hours a month connecting with hospitals & referral agencies

SERVICES

- You lack a variety of amenities
- You are not sure what makes your services better than a competitors
- You lack vibrant dining and life enrichment programs
 - Your dining menu has limited choices per meal
 - Do you meet a variety of dietary challenges?
- Your activities lack creativity and are mainly bingo, board games, singing, and TV

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Notes:



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