



OCCUPANCY IN A BOX™

THE COMPLETE OCCUPANCY OPERATING SYSTEM

EVERY PROCESS. EVERY TOUCHPOINT. EVERY TOOL YOU NEED.



Proven Systems
Built by experts.
Tested in senior
communities



Measureable Results
More tours, higher
conversion, stronger
occupancy



Consistent Performance
Standardized processes
that drive consistent
results.



Stronger Teams
Better experiences,
high satisfaction,
more move ins.

EVERY STAGE. EVERY PROCESS. COVERED.

Occupancy in a box includes complete Standard Operating Procedures for every critical stage of the resident journey.

Marketing & Lead Generation

Proven strategies to attract, capture and qualify leads

Tour Management

Tour scheduling, pre-tour preparation and follow up processes

Lead Qualification

Qualification scripts and worksheets to identify the best fit

Move In Experience

Creating a memorable move in that builds connections

Proposal & Next Steps

Personalized proposals to drive decisions

Consultative Sales

Relationship first approach that builds trust and urgency with residents

Data & Performance

Track what matters, monitor, measure and improve daily

Events & Outreach

Community events and outreach plans that build visibility and occupancy

Conversion To Move In

Conversion documentation & checklists

Referrals & Advocacy

Happy residents become your best source

Re-activation & Win Back

Re-engage past prospects and inactive leads

Inquiry Management

Fast, consistent responses that convert inquiries to conversations

SCRIPTS THAT CONNECT.

TEMPLATES THAT CONVERT.

Professionally written scripts and templates for every step of the customer journey.

Phone Scripts

Purpose built call scripts for every lead type in the sales journey

Follow Up Campaigns

Multi-touch follow up plans for leads at every stage of the process

Text Templates

Short, effective texts that are human like and get responses

Re-engagement Plans

Win back lost and inactive leads with proven strategies

Email Templates

Branded emails that inform, nurture and convert leads

Event Planning Tools

Event checklists, timelines and promotion strategies and templates

Objection Handling

Responses to the most common objections and hesitations

Custom To Your Community

Every script and template is tailored to your brand, voice and standards.

PROCESSES THAT CREATE CONSISTENT CONSISTENCY THAT DRIVES RESULTS.

ONE TIME INVESTMENT

\$1,995

One complete system built exclusively for your community.

BUILT FOR RESULTS BACKED BY PURPOSE

We are not here to hand you a binder. We are here to build a system that becomes the foundation for your communities growth.



Strategy & Structure
Organizational structure, roles, responsibilities & performance standards



Processes & Workflows
Step-by-step SOPs for every lead type and customer touch points throughout



Hire & Onboard
Job descriptions, interview guides, 30/60/90 day onboarding



Training & Development
Training guides, coaching tools & ongoing team development



CRM & Technology
CRM standards, lead routing, automations and best practices



KPIs & Dashboards
Track what matters, monitor performance and drive results



QA & Accountability
Scorecards, checklists, monitoring & feedback loops for your entire team



Communication Standards
Consistent, professional communication frameworks that fill the sales pipeline

YOUR JOURNEY. 30 DAYS TO TRANSFORMATION

1

SUBMIT APPLICATION

Tell us about your community and your goals

2

APPLICATION REVIEW

We'll review and schedule a strategy call with you

3

SECURE YOUR BUILD

Investment received. Your production is reserved

4

WE BUILD (30 DAYS)

We create a fully custom occupancy operating system

5

LAUNCH WITH CONFIDENCE

We deliver. You implement and continue to grow

LIMITED SPOTS. MAXIMUM IMPACT.

Applications are now open.

Because every system is built specifically for each community, we accept a limited number of projects at a time.

APPLY TODAY TO SECURE YOUR SPOT

Let us build your OCCUPANCY. Your advantage starts now.

WHAT IS INCLUDED

BDC in a box includes complete Standard Operating Procedures for every critical stage of the customer journey.

✓ Leadership & Occupancy Strategy

Executive Implementation Guide
Occupancy Growth Blueprint
Sales & Marketing Framework
Roles & Responsibilities
Occupancy Goal Setting
Performance Standards
Community Growth Roadmap

✓ Scripts & Templates

Phone Scripts
Text Templates
Email Templates
Voicemail Scripts
Objection Handling Guides
Family Conversation Guide
Event Invitations

✓ Standard Operating Procedures (SOPs)

Complete Sales Process
Consultative Selling Framework
Discovery Conversation Guide
Qualification Framework
Closing Strategies
Conversion Processes
Community Operations Support
Referral Development
Tour Experience System
CRM Standards
Marketing & Lead Generation
Outreach Guides
Events & Community Engagement
Move In Experiences
Resident & Family Experience
Occupancy KPIs
Inquiry Management

AND
MORE...