

The Direction the Data Turns

What whole-community CRM data shows before, during, and after a fractional Remote Sales Specialist enters the database — four communities, May 1 through August 13, 2026

Compass Senior Living Solutions • Communities anonymized; details available with operator permission

How to read this study

This analysis uses **whole-community Sales Activity Summaries pulled from the operators’ CRMs** — onsite teams and Compass combined, not Compass self-reporting. May 2026 is the baseline: Compass supported no community that month. From June, a fractional RSS (under 7 hours a week at most communities) entered each database with one assignment: **not new leads — the aged database**. The RSS worked the “gold in the cold” using the Compass Re-Engagement Strategy — a proprietary cadence system built for large, older databases — establishing contact, setting MUTANS (Mutually Agreed-upon Time-Activated Next Steps), and building handoff strategies the onsite teams keep after the fractional project ends.

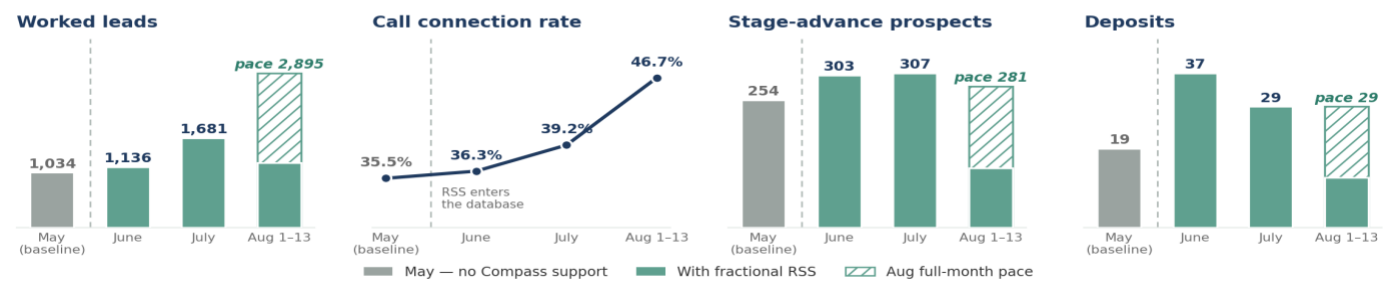
The control that makes this credible: new inquiries were essentially flat all four months — 310, 305, 295, and a 277 pace. Nothing below was bought with more leads. The gains came from the same databases, worked differently.

The four communities

	Profile	Onsite sales staffing	Fractional RSS
Community A	AL/MC — 80 units	1 FTE Sales Leader, M–F coverage	June–August
Community B	IL/AL — 179 units	2 FTE Sales Leaders, M–F coverage	June–August (light)
Community C	IL/AL/MC — 207 units	1 FTE Sales Leader + 1 fractional Area Sales Leader, M–F	Mid-June–late July
Community D	IL/AL/MC — 226 units	2 FTE Sales Leaders, Mon–Sat coverage	Light June–mid-July; surged late July–mid-Aug

The portfolio turn

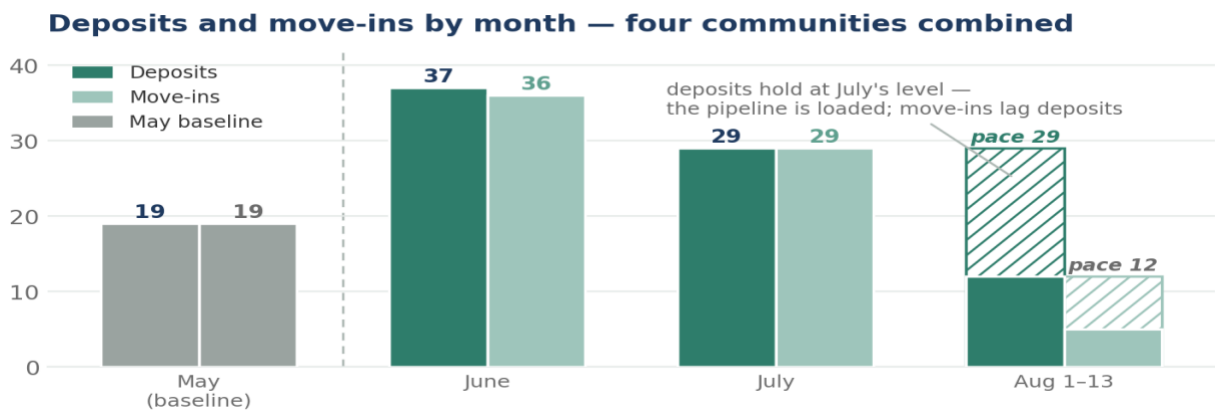
Four communities combined — whole-community CRM data, same flat inquiry flow



Grey = May baseline (no Compass support). Hatched = August 1–13 projected to a full month. Every metric is whole-community CRM data.

Read left to right: the same four databases, the same flat inquiry flow — and every stage of the funnel turns when the RSS enters. Worked leads climb from 1,034 to 1,681 and are pacing toward **2,895 in August (+72% over July)**. The call connection rate climbs every single month — **35.5% → 36.3% → 39.2% → 46.7%** — as the Compass Re-Engagement cadence warms the database. Stage-advance prospects — aged inquiries re-contacted and confirmed as viable — jump 21% the month the RSS arrives and hold there: that is old leads being re-qualified, which is precisely the assignment.

Deposits lead, move-ins follow



Move-ins nearly doubled in the first RSS month (19 → 36). August move-ins trail while deposits pace at July’s level — the leading indicator says the month is building, not fading.

The gold in the cold

The Move-In Metrics report answers the question every operator should ask: **which leads actually became move-ins, and how much work did they take?**

14–15 days average lead age of Communities A & B’s May move-ins — before RSS, only fresh leads converted	499 days average age of Community B’s nine July move-ins — the database produced them, not the ad budget	2,055 days a lead over five years old moved in this August, re-engaged from the cold database
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The work behind those conversions is visible in the same report. Activities per move-in rose from 4.95 calls (May) to 6.9–6.2 (June–July): older leads take more touches, and the touches got made. Texts per move-in quadrupled (0.79 → 3.19). And the number that shows the strategy landing: **inbound calls per move-in more than doubled, 0.32 → 0.69 (+116%)** — re-engaged leads are calling the communities back. Meanwhile the division of labor held: onsite Sales Leaders stayed focused on fresh inquiries while the RSS nurtured the archive — each list got the attention it actually needs.

Community by community

Community A — AL/MC, 80 units, 1 FTE Sales Leader (M–F)

	May (baseline)	June	July	Aug 1–13 (pace)
Worked leads	84	131	123	76 (181)
Successful / total calls	89/195 (46%)	153/387 (40%)	147/290 (51%)	71/113 (63%)
Texts	6	60	147	17 (41)
Tours completed	8	7	15	6 (14)
Stage-advance prospects	37	55	44	10 (24)
Stage-advance tours	7	7	12	4 (10)
Deposits	1	5	6	2 (5)
Move-ins	1	4	7	2 (5)

The turn: move-ins stair-stepped 1 → 4 → 7 with the RSS in the database; connection rate rose 46% → 63%; texting, near zero at baseline, became a working channel (6 → 147).

Community B — IL/AL, 179 units, 2 FTE Sales Leaders (M–F)

	May (baseline)	June	July	Aug 1–13 (pace)
Worked leads	318	280	454	277 (661)
Successful / total calls	178/703 (25%)	109/444 (25%)	148/452 (33%)	86/253 (34%)
Texts	147	130	162	131 (313)
Tours completed	25	17	20	7 (17)
Stage-advance prospects	62	61	65	34 (81)
Stage-advance tours	18	13	17	5 (12)
Deposits	3	4	10	4 (10)
Move-ins	3	4	9	2 (5)

The turn: deposits tripled (3 → 10) and move-ins tripled (3 → 9) by July — and July’s move-ins averaged 499 days old. August worked leads are pacing at 661, double the baseline.

Community C — IL/AL/MC, 207 units, 1 FTE + 1 fractional Area Sales Leader (M–F)

	May (baseline)	June	July	Aug 1–13 (pace)
Worked leads	347	264	308	182 (434)
Successful / total calls	325/774 (42%)	367/778 (47%)	333/713 (47%)	230/382 (60%)
Texts	311	320	393	295 (704)
Tours completed	25	32	29	18 (43)
Stage-advance prospects	80	96	106	37 (88)
Stage-advance tours	27	26	29	12 (29)
Deposits	7	11	10	2 (5)
Move-ins	7	11	10	0

The turn: the best-staffed community still got measurably better: stage-advance prospects 80 → 106, connection rate 42% → 60%, move-ins 7 → 11. August’s zero move-ins (with two deposits collected) is the number to watch as the initial fractional engagement wound down in late July.

Community D — IL/AL/MC, 226 units, 2 FTE Sales Leaders (Mon–Sat)

	May (baseline)	June	July	Aug 1–13 (pace)
Worked leads	285	461	796	679 (1,619)
Successful / total calls	229/640 (36%)	322/1,010 (32%)	373/1,101 (34%)	225/563 (40%)
Texts	303	453	567	347 (828)
Tours completed	12	19	15	10 (24)
Stage-advance prospects	75	91	92	37 (88)
Stage-advance tours	18	22	15	9 (21)
Deposits	8	17	3	4 (10)
Move-ins	8	17	3	1 (2)

The turn: June’s 17 move-ins preceded the July move-out wave documented separately. The late-July surge shows exactly where it should: worked leads 285 → pacing 1,619, emails 199 → pacing 3,000+, and deposits recovering from 3 to a ~10 pace — the funnel refilling before the census can.

Is August building or fading?

Portfolio metric	July	Aug 1–13 pace	Trajectory
Worked leads	1,681	2,895	Better (+72%)
Successful calls	1,001	1,459	Better (+46%)
Connection rate	39.2%	46.7%	Better (+7.5 pts)
Tours completed	79	98	Better (+24%)
Stage-advance prospects	307	281	Holding (still above the 254 baseline)
Deposits	29	29	Even (+53% vs. baseline)
Move-ins	29	12	Trailing — but move-ins lag deposits, and deposits are holding

Thirteen days in, August is a **building month**: every activity and qualification metric is at or above July’s level, deposits are even with July, and the one trailing number — move-ins — is the one that structurally arrives last. The story of this dataset is momentum, and the momentum is intact.

Honest numbers

- Whole-community CRM data includes onsite team activity; Compass does not claim sole credit for any figure. The claim is directional and repeated four times: the data turns when the RSS enters, at every community, on flat inquiry volume.
- May is a single-month baseline, and August is 13 days projected to 31 — both stated on every chart. Correlation across four communities with a common start date is strong evidence, not a controlled experiment.
- Communities C and D converted some aged leads before RSS support began; the before/after lead-age contrast is sharpest at A and B, and we present it that way.
- Community D’s July move-in slump reflects the move-out wave documented in the companion case study — the two reports reconcile.

The takeaway

Four communities, four staffing models, one flat lead flow — and one repeated pattern: when a fractional RSS enters the aged database with the Compass Re-Engagement Strategy, connection rates climb month over month, dormant leads re-qualify, deposits rise, and move-ins follow — including move-ins from leads 499 and even 2,055 days old that no one was going to call again. Less than seven extra hours a week, pointed at the leads a community already owns. The database was never dead. It was waiting for a cadence.

Compass Senior Living Solutions • Fractional remote sales and financial advocacy for senior living communities • [contact information]