One System. A Fraction of a Salary. Census Defended and Grown.

Case Study: Fractional Remote Sales (RSS) + Financial Advocacy (CFA) at a 207-Unit Senior Living Community — June–July 2026

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

The situation

Entering June 2026, the community stood at **84.8% occupancy (175.5 of 207 units)** heading into summer — the season when move-outs pressure every census. Its CRM held **over 520 active leads**, more than 420 of them cold: inquiries the community had already paid to generate, going stale. The onsite sales team was doing what onsite teams do — tours, families, move-ins, events. The two jobs that structurally fall off a stretched sales desk are the ones that decide whether a database converts: **persistent multi-touch follow-up** and **answering "how do we pay for this" with a real plan**.

The wrapped system

Compass wrapped two fractional services around the existing onsite team — no new full-time hire, no replacement of anyone's role:

- **Remote Sales Specialist (RSS), 3–7.5 hours per week.** Owns persistence: speed-to-lead, text-first multi-channel cadence, database re-engagement database hygiene, and tour scheduling. The RSS doesn't close — she manufactures at-bats for the people who do.
- **CFA financial advocacy program.** Owns confidence: financial discoveries with families, and identification of funding resources (VA benefits, long-term care policies, bridge solutions, home-sale strategy). Many "cold" leads aren't disinterested — they're financially stalled. The CFA re-qualifies them.
- **The onsite team** owns what it should: relationships, tours, and closes — now fed warmer, financially confident prospects.

Eight weeks of activity

Metric	Result
Fractional RSS hours invested	**44.5 hours (avg ~6 hrs/week)**
Personal touches (RSS + CFA combined)	**438 — 137 calls, 165 texts, 136 emails**
Phone connection rate	**39% blended; weekly rate climbed from 25% to a peak of 51%**
Tours completed	**50 (≈ 1.1 tours per RSS hour worked)**
Stage-advance tours scheduled	**46**
New leads received / stale leads closed out	**239 received / 130 closed — active database still grew 521 → 547**
Move-ins (directional attribution)	**5**
Extended stays (move-outs prevented via financial resources)	**2**
Net census	**175.5 → 177.5 occupied of 207 (84.8% → 85.7%)**

The connection-rate climb tracks the cadence design: weeks with heavier text-first outreach ran materially higher phone connect rates — by late July, more than half of dials were reaching a human. And the census tells an honest story: occupied units dipped to 174 mid-period as summer move-outs hit, then recovered to 177.5. The gross move-ins tracked through the program (5) reconcile with the net gain (+2) precisely *because* move-outs happened and were offset. We publish the dip on purpose — see "How we measure," below.

The ROI stress test

Total program investment for the two-month period: **$4,437.50**. At the community's $4,300 average monthly rate, here is the return at three levels of attribution — including the one built for skeptics:

Scenario	Attribution assumption	First-year revenue*	Return on $4,437.50
Skeptic's floor	Credit the program with only ONE of the five move-ins	$51,600	**11.6 : 1**
Directional	Credit the five move-ins tracked through the CFA program	$258,000	**58 : 1**
Census-only anchor	Ignore move-in attribution entirely; value only the +2 net occupied units (annualized vs. annualized program cost)	$103,200 / yr	**3.3 : 1**

First-year rent only, at $4,300/month. No length-of-stay uplift, no value assigned to the 2 extended stays, 50 tours, database cleanup, or 4 partner referrals — all of which are additional return.

> **The breakeven line:** program cost equals just **8.6% of a single move-in's first-year rent**. An operator doesn't have to accept our attribution to accept the ROI — the program pays for itself unless it influenced less than one-eleventh of one move-in over two months. Put another way: two months of the entire wrapped system costs about **one month's rent of a single apartment** — less than a typical paid-referral agency fee for one placement, and it worked the leads the community had already paid for.

Efficiency, unit by unit: roughly **$10 per personal touch**, **$67 per completed tour** (RSS hours), and **$888 per directional move-in**. Annualized, the system runs about $31,400 — and the +2 net units alone represent $103,200 in annualized revenue.

How we measure — and why some numbers are "directional"

The operator's onsite team controls the CRM, and lead ownership is routinely reassigned at tour and move-in. Rather than claim a precision the data doesn't support, we agreed with the operator to report individual move-in attribution as **directional** — and to rest the ROI case on numbers no one can reassign: hours billed, program fees, and net occupied units. Our reporting standard, on every engagement:

- Net census published with the dips left in — never a cherry-picked end-of-month snapshot.
- Every percentage reproducible from stated raw counts and denominators.
- Gross move-ins and net census shown together, so move-outs are never hidden.
- Attribution labeled honestly: tracked where the data allows, directional where it doesn't.

When the community, the operator, and the wrapped team are progressing together, the census settles the argument. We invite operators to stress-test these numbers — and anyone else's — with the same five questions: check the denominators, compare the timeline to the real sales cycle, trace the attribution, net out the move-outs, and solve for the community size. Ours hold.

The takeaway

This community didn't need another full-time hire. It needed a **system**: fractional persistence, financial advocacy, and an onsite team freed to sell — working hand in hand with operations. Eight weeks, one work-week of fractional sales time, about a month's rent in total cost: 438 personal touches, 50 tours, a cleaner database, five move-ins, two saved residents, and a census that grew through move-out season.

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