



Successful Strategies Help Trinity Health Senior Community Occupancy Levels Rebound in 2021

By: Christine Looby, MA



Trinity Health Senior Communities is celebrating an outstanding beginning to 2021. In particular, its first quarter boasted results that told the story of motivated and talented sales counselors, a creative, hands-on leadership team, and seniors across the country who see the value in what Life Plan Communities have to offer.

“We are celebrating a 127% percent increase in move-ins across our system since January,” said Jacqueline Lunsford, vice president of sales and marketing for Trinity Health Senior Communities (THSC.) “What’s just as impressive and even more promising is that during each month of the first quarter, we saw consecutive growth. By March, we saw a 62% increase in new leads over January. In particular, word of mouth in our local communities, professional referrals, and social media were our strongest drivers.” During this time, THSC launched its revamped web page, www.trinityhealthseniorcommunities.org/, bringing each of its 30 owned and managed communities onto the same web platform for the first time. “That consistency in visual identity and cultural feel goes a long way in showing prospective residents who we are and why – no matter which market they live in – they’ll feel at home in our mission-focused communities,” Lunsford explained. “We hold true to who we are as faith-based, not-for-profit communities even as we demonstrate the very best in hospitality, service, wellness, and style.”



Jacqueline Lunsford, THSC
VP of Sales and Marketing

THSC offers senior living options in eight states. Its portfolio includes independent living, assisted living, subsidized senior apartments, memory care, skilled nursing, rehabilitation services, and Life Plan Communities (formerly known as Continuing Care Retirement Communities.) Jacqueline Lunsford oversees a team of more than 20 sales professionals. In her role, she offers training, counsel, best practices, and aims to keep her salesforce accountable and motivated. She works with counselors on the discovery process, teaching them techniques to build rapport with prospective residents, to overcome objections, and to be helpful as families try to make the best possible decisions for their future living and health care arrangements.

“Since the start of the new year, we really began to apply some aggressive metrics in our expectations, and I am so proud of how our teams have risen to the challenge,” Lunsford said. After carefully reviewing a team’s lead base, area demographics, and residential capacity, she determines a feasible number of daily phone calls each counselor should be making, tours conducted, and a



THSC's Glacier Hills, Life Plan Community in Ann Arbor, MI

goal for how many residents should move in each month. She assigns the metrics and adjusts them monthly.

For Lunsford, acknowledging and cheering the successes is as important as fine-tuning the metrics. “I know from my own career experience how critical it is when you’re working hard every day to have someone notice both the big ways and the small ways

you’re moving the needle,” she said. “For example, I tell each sales team that they should have at least 20 scheduled significant referral source engagement appointments each month. In March, 39% of our move-ins came from referrals; that’s incredible! Those referrals can be residents, staff, or local professionals. To be sure, we raise the baseline goal when we see that kind of response, but not before really applauding the effort that went into nurturing the relationships that made the success possible.”

One of the reasons the sales successes seem especially impressive is because the global pandemic raised so many concerns for seniors who had been considering a move to congregate housing and for their families. Before the FDA’s approval of the Pfizer and Moderna vaccines for Emergency Authorization Usage, sales counselors were routinely seeing fearful prospective residents hesitating to deposit or indefinitely delaying their move into communities, afraid of contracting the virus. Jason Page, director of sales at Glacier Hills in Ann Arbor, MI, believes that there is a direct correlation between the introduction of the vaccines to the senior population and his team’s achievement of an independent living occupancy goal set at 90%. He also believes that the new website has played a part, giving Glacier Hills a stronger social media presence and capturing more leads than ever before.

Page said that the most effective way to handle questions or concerns about the pandemic is the simplest: he tells prospective residents the truth. “My approach is to reassure them about our safety protocols from an infection control standpoint. We are very blessed to have not had many COVID-19 cases on our campus and are very fortunate to be part of THSC, which has provided us with ample amounts of PPE and rapid tests to ensure the safety of our residents and staff. In addition, we have a 99.99% vaccination rate for our residents and this has allowed small group activities as well as indoor dining.”

What’s more, a booming housing market has been in Glacier Hills’ favor. “The housing market is very strong and now is a great time to make a move into a community to enable our residents to live a carefree lifestyle. At Glacier Hills, our residents’ needs are being met by our support services to keep them safe, so they do not have to go out to run errands. These services include a weekly grocery delivery service, an onsite medical clinic with gerontologists from the University of Michigan, a hair salon, gym, library and a range of activities and entertainment. Once our residents move into our community, they understand what a carefree, worry-free lifestyle means and it allows them to take back their independence. In addition, their family members can become family again as opposed to caregivers,” Page said.

Kimberly Wessell, director of sales and marketing at St. Joseph of the Pines in Southern Pines, NC, says that

talk of what's happening with real estate in their area is becoming a more regular focus of her team meetings. "The hot housing market has been a prominent topic recently. It's a seller's market here in our area, so this has helped to "move up" the timeline of people who want to move sooner to take advantage of selling their home quickly and getting top dollar," Wessell shared.

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The promise a Life Plan Community makes is another reason Page credits with recent successes. "The philosophy of Life Plan Communities really resonates with our future residents. They like that they will be guaranteed the continuum of care on our campus. In addition, our community is in the heart of a college town and our programming reflects the lifelong learning philosophy."

While grateful for the acknowledgment of their wins, counselors are quick to point out that they draw upon some very important resources during the sales process: their current residents. "We get many referrals and in fact will be hosting Resident Referral events at both of our independent living communities next week. This is very beneficial because these leads already have friends within our communities,

which makes for a good transition to the community lifestyle," Kimberly Wessell said.

Andrea Hengy, director of admissions at The Neighborhoods of White Lake in White Lake Township, MI, agrees. "White Lake is not a large town, and we do get a lot of our referrals from word of mouth," she said, adding, "Our residents will tell friends about how much they love our neighborhoods concept and that they feel comfortable and safe here." Those endorsements matter. Prospective residents trust current residents to tell them the unvarnished truth about everything from the moving process to meal quality to housekeeping frequency. Current residents are a formidable factor in the conversion equation, and many communities consider them ambassadors, or informal extensions of the professional staff.

Jacqueline Lunsford says that she commends the multifaceted approach her communities have taken to increasing occupancy. "Each of these components – referrals, the close monitoring of digital leads, tours, and special events – is an important tool in the counselors' toolboxes," she asserted. "To see that we have emerged into 2021 better for having mastered staying connected, being flexible and individual in our approaches to prospective residents, and having beautiful, welcoming residences has been so empowering to the team. I can't wait to see where we grow from here."