

Occupancy Recovery Worksheet

What happened 30, 60, and 90 days prior to the occupancy decline?

Realistic Recovery Goal

Current Occupancy: _____ Target Occupancy: _____

of Move-ins Needed: _____ Time Frame: _____ weeks/months

We will achieve _____ move-ins in _____ weeks.

Tactics Checklist

Week One

- Monday: Review and organize your lead pipeline and create a daily follow-up schedule.
- Tuesday: Send a **weekly** email or video to prospects and professional partners.
- Wednesday: Ask 5 residents if they have a friend who might enjoy the community.
- Thursday: Invite residents to a coffee talk or social event where they can bring guests.
- Friday: Connect with 5 referral partners (visit, call, or host coffee).
- Daily: Call 20+ prospects on the warm list. Keep it short to set a next step. Don't say: "I'm calling to check in". Build trust. Use your CRM notes to connect to what you heard them say.

Week Two

- Monday: Host a small resident social event where guests are welcome. Immediately place guests in the CRM with a next step activity.
- Tuesday: Call hot prospects and invite them to a lunch, dinner, activity, or overnight stay.
- Wednesday: Text 20 cold prospects. There is gold in the cold.
- Thursday: Ask 5 more residents for introductions or referrals.
- Friday: Connect with 5 additional referral partners. Share one resident success story.

Team Engagement

- Communicate the recovery goal with all staff. Ask for help with referrals.
- Recognize team contributions tied to occupancy with an award or recognition.
- Plan a simple staff appreciation event when the next occupancy milestone is reached.