

Operator Readiness Checklist

Your Go-to-Market Gut Check for the Senior Living Ecosystem

Is your solution really ready for senior living?

This comprehensive diagnostic tool helps you evaluate how aligned your product, messaging, GTM strategy, and operations are with the real-world needs of senior living operators, staff, and families. Designed for startups and growth-stage tech companies entering the senior living space, it offers an in-depth lens into all critical readiness dimensions.

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Introduction

Before You Pitch, Pilot, or Partner...

Senior living isn't like any other market. Sales cycles are longer. Relationships matter more. Buyers may be clinical, financial, or operational leaders — and they rarely make fast decisions. Your product may be fantastic, but if you aren't ready for how this ecosystem works, you'll stall.

This checklist helps you:

- Evaluate your current operator readiness
- Identify strategic and operational blind spots
- Prepare to build trust and deliver value in real-world communities
- Strengthen your pilot-to-scale approach and internal alignment

Use it before you launch outreach, build pitch decks, or set your sales goals for the year.

The Checklist

For each area below, check the box if your team is confident in this aspect of readiness. Use the notes section to flag any gaps or next steps.

☐ **Product Alignment**

- ☐ We solve a clearly prioritized, budgeted need for SL operators
- ☐ We've validated product-market fit with direct feedback from operators
- ☐ Our product supports measurable outcomes in staffing, occupancy, safety, or compliance
- ☐ We can segment our value proposition for IL, AL, MC, and SNF operators
- ☐ We understand daily operator workflows and how we complement them
- ☐ We integrate with or accommodate EHRs, CRMs, and key systems in SL

Notes:

☐ **Pilot Strategy**

- ☐ We have a detailed pilot plan: scope, metrics, duration, and conversion path
- ☐ Our pilot reduces perceived risk for the operator
- ☐ We align on pre-defined success metrics (KPIs, outcomes)
- ☐ We provide resources to enable rapid onboarding and consistent usage
- ☐ We conduct post-pilot reviews with key stakeholders

Notes:

☐ **Operator Messaging**

- ☐ We tailor messaging for execs, department heads, and staff
- ☐ We speak to both emotional and business drivers
- ☐ Our collateral avoids jargon and resonates with care values
- ☐ We emphasize partnership and outcomes, not just features

Notes:

☐ **Sales & Distribution Model**

- ☐ We understand the multi-layered SL buying process
- ☐ We support long sales cycles and multiple touchpoints
- ☐ We have pricing that fits both multi-site and regional providers
- ☐ Our team is trained in SL-specific objections and decision drivers

Notes:

☐ **Training, Support & Longevity**

- ☐ We provide onboarding by role (admin, clinical, IT, frontline)
- ☐ We offer live and asynchronous training
- ☐ Our support model reflects SL needs (off-hours, shift-based, high turnover)
- ☐ We build renewal and expansion strategies into post-sale support

Notes:

☐ **Credibility & Trust Building**

- ☐ We have SL-specific social proof (case studies, testimonials, pilots)
- ☐ We've engaged respected advisors or board members with SL credentials
- ☐ We speak credibly about compliance, liability, and safety standards

- ☐ Our outreach is education-driven and not overly transactional

Notes:

☐ Regulatory & Compliance Readiness

- ☐ We understand SL-specific regulations (e.g., HIPAA, CMS, ALFA guidelines)
- ☐ We have policies in place to address data privacy and access control
- ☐ We are prepared for security reviews or IT vendor assessments by SL organizations
- ☐ Our legal documents (e.g., BAAs, contracts) have been reviewed for SL appropriateness

Notes:

☐ Technology & Infrastructure Fit

- ☐ Our product is lightweight and can run in low-tech environments
- ☐ We support integrations or provide workarounds for common SL systems (PointClickCare, MatrixCare, etc.)
- ☐ Our UI/UX is designed with non-technical users in mind
- ☐ We have mobile, desktop, and shared workstation usability

Notes:

☐ Competitive Positioning

- ☐ We have mapped direct and indirect competitors in the SL market
- ☐ We can articulate what makes us uniquely valuable to SL vs. general tech solutions
- ☐ We have proactive answers to "Why now?" and "Why us?" objections
- ☐ We regularly update positioning based on feedback and competitor shifts

Notes:

☐ Strategic Partnerships & Ecosystem

- ☐ We have identified potential SL associations, alliances, or thought leaders to align with
- ☐ We are part of at least one SL-specific industry group or event series
- ☐ We understand the role of GPOs, referral platforms, and regional buying groups
- ☐ We have begun outreach or collaboration with ecosystem players (VCs, provider networks, policy orgs)

Notes:

Final CTA


Not 100% Ready? That's Where We Come In.

SWS Consulting helps tech companies land and scale in senior living — with go-to-market strategy, messaging, compliance planning, and operator engagement that works. We know the space, we speak the language, and we build the trust that gets you in the door and helps you stay there.

Book a free discovery call and let's walk through your checklist together.

 [Book a Call]

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