



ASSISTED LIVING | RESIDENTIAL CARE | MEMORY CARE | SENIOR LIVING

EXCEPTIONAL
COMMUNITIES
STRONGER
TOMORROWS

Fill Beds. Grow Revenue. *Own the Family Journey.*

A clear occupancy and growth system
for independent and growing operators
who need more inquiries, more tours,
and a better path to move-ins.



WEBSITE



VISIBILITY



CRM



FOLLOW-UP



REVIEWS



REPORTING

PREPARED FOR

[Client / Facility Name]

Katherine Martinez

SENIOR LIVING GROWTH PARTNER



949 698 6800



katherine@panoramicassessments.com



panoramicassessments.com

PEOPLE
BELONG HERE

*More Residents.
Stronger Communities.
A Brighter Tomorrow.*

You do not need a bigger “marketing department.” *You need a cleaner path from search to move-in.*

Panoramic is designed for independent assisted living, residential care, board & care, and memory care operators — especially teams with real openings to fill and a stronger economic reason to improve occupancy.

STRONGER
OCCUPANCY
BRIGHTER
TOMORROWS

01



BE FOUND

Families must be able to discover your community online. A strong presence across search, maps, and local directories puts you in front of the right families at the right time.

02



RESPOND FAST

When a family reaches out, fast response matters. Speed and consistency build trust, answer questions, and keep interest from going to another community.

03



STAY IN THE CONVERSATION

Follow-up, reminders, and nurturing help turn interest into tours and move-ins. Automated, personalized communication keeps your community top of mind until the decision is made.

The goal is to protect occupancy revenue while giving you more control over the family relationship.

One empty room is not a marketing problem. *It is a revenue gap.*

The system is built around the issues most likely to hurt occupancy.



Vacant Rooms

Every empty room represents lost revenue and missed opportunity.



Missed Calls

Inquiries go unanswered, and prospects move on.



Trust Gap

Families need confidence before they tour, and mixed or missing information creates doubt.



Referral Dependence

Relying on word-of-mouth alone limits growth and leaves you vulnerable to slow periods.



Weak Follow-Up

Leads cool quickly without a consistent, automated follow-up process.



Invisible Online

If your community is hard to find or doesn't tell its story, families choose someone else.

*Visibility. Response speed.
Tour conversion. Follow-up.
Tracking.*

Solve the real issues. Fill more rooms.



One connected path from *“we need care”* to *“this feels right.”*

Families judge the home at every step.
Panoramic connects those steps so the conversation keeps moving.



SEARCH

Explore. Notice. Consider.



TRUST

Compare.
Research. Feel sure.



CONTACT

Call. Inquire.
Share needs.



TOUR

Book a tour.
Experience in person.



FOLLOW-UP

Answer questions.
Share next steps.



DECISION

Choose with confidence.
Begin the process.



MOVE-IN

Transition. Feel at home.

The advantage: you see the whole story — not a pile of disconnected leads.

Family inquiry > Contacted > Qualified > Tour Scheduled > Tour Complete > Assessment / Care Review > Decision > Move-In



ASSISTED LIVING | RESIDENTIAL CARE | MEMORY CARE | SENIOR LIVING

EXCEPTIONAL
COMMUNITIES
STRONGER
TOMORROWS

*Better visibility.
Stronger decisions.
More families home.*

What Panoramic installs behind the scenes.

Your staff should experience one organized admissions and growth system – not disconnected software.



WEBSITE + LOCAL VISIBILITY

A modern, high-converting website with local search optimization to get you found by more families.



INQUIRY CAPTURE + RESPONSE

Capture every inquiry and respond faster with automated routing, alerts, and simple workflows.



CRM + FOLLOW-UP

Keep every family on track with a centralized CRM, tasks, and automated follow-up.



REVIEWS + TRUST

Generate more positive reviews and showcase your reputation across the places families search.



PAID LEAD GENERATION

Targeted ad campaigns that bring you qualified, cost-efficient inquiries in your market.



REPORTING + STRATEGY

Clear dashboards and expert strategy support to measure progress and guide what's next.

One team. One system. One family journey.

Start Where Your Home Is Today. *Build Up as Occupancy and Operations Grow.*

These four offers help independent operators, growing teams, and portfolio groups choose a system that fits their current stage and growth goals.

EXCEPTIONAL
COMMUNITIES
STRONGER
TOMORROWS



FOUNDATION

\$599 / month

For very small teams

- ✓ Up to 5-page website
- ✓ Google Business Profile optimization
- ✓ Lead form + click-to-call
- ✓ Reviews support
- ✓ Monthly visibility check



OCCUPANCY CORE

\$1,500 / month

For 1 location

- ✓ Occupancy pipeline + tracking
- ✓ CRM + family inquiry pipeline
- ✓ Missed-call text back
- ✓ Automated lead follow-up
- ✓ Review system
- ✓ Monthly occupancy report



MOST POPULAR



OCCUPANCY GROWTH

\$3,500 / month

For active acquisition

- ✓ Everything in Core
- ✓ Meta resident lead campaigns
- ✓ Landing page optimization
- ✓ Nurture + re-engagement
- ✓ Tour scheduling automation
- ✓ Reputation management
- ✓ Reporting + insights



MULTI-HOME SCALE

\$6,500 / month

For growing operators

- ✓ Everything in Growth
- ✓ Multi-location funnels
- ✓ Lead routing + staff permissions
- ✓ Custom reporting
- ✓ More automation capacity
- ✓ Priority strategy support

07 | YOUR NEXT STEP

Which plan makes sense for your home?

Use the urgency of their occupancy problem — not company size — to choose the right starting point.

	YOUR CURRENT NEED	RECOMMENDED PLAN	MONTHLY INVESTMENT
01	 You need a stronger online presence.	FOUNDATION	\$599 / month
02	 You have openings and follow-up is inconsistent.	OCCUPANCY CORE	\$1,500 / month
03	 You want to actively create more direct inquiries and tours.	OCCUPANCY GROWTH	\$3,500 / month
04	 You operate multiple homes or need deeper routing and reporting.	MULTI-HOME SCALE	\$6,500 / month

“Show the gap first. Show the system second. Show the price third.”

08 | THE FIRST MONTH

Momentum should be visible in the first month.

The first month is about building the system fast, connecting the family journey, and giving your team something valuable to operate.

1



WEEK 1

AUDIT + BUILD

Audit your marketing assets
and build the occupancy pipeline.

2



WEEK 2

CONNECT + PREP

Connect your forms, calendars,
reviews, and creative.

3



WEEK 3

LAUNCH + TEST

Launch campaigns and
automations and test speed-to-lead.

4



WEEK 4

REVIEW + OPTIMIZE

Review lead quality, report
progress, and set the next plan.

The goal is not to rebuild the campaign every day. Launch, qualify, learn, improve, then scale.

*More Residents.
Stronger Communities.
A Brighter Tomorrow.*

We measure the path to revenue — *not marketing noise.*

Reporting should help an operator answer where families are moving forward and where they are falling out.

01

**DIRECT INQUIRIES**

How many families reached out directly?

02

**RESPONSE SPEED**

How quickly did the team make contact?

03

**TOURS BOOKED**

How many qualified families reached a tour?

04

**TOURS COMPLETED**

How many actually arrived and toured?

05

**PIPELINE MOVEMENT**

How many families advanced to care review, decision, and deposit?

06

**MOVE-IN TRACKING**

What happened downstream from each source?

Before you spend more, *find out where revenue is leaking.*

The audit turns the occupancy conversation into operating and financial math across capacity, vacancies, response speed, visibility, and follow-up.

WE REVIEW:

- ✓ Licensed beds / capacity
- ✓ Current vacancies
- ✓ Average monthly resident value
- ✓ Inquiry response speed
- ✓ Tour process
- ✓ Review reputation
- ✓ Google visibility
- ✓ Follow-up and nurture

Fill Beds. Keep More of the Money. Build a stronger occupancy system.

Katherine Martinez
SENIOR LIVING GROWTH PARTNER

📞 949 698 6800
✉ katherine@panoramicassessments.com
🌐 panoramicassessments.com

People.
Partnership.
A Brighter Tomorrow.