

Elevating the Experience: Delivering Exceptional Customer Service in Senior Living

Gina Mancini, LNHA, CEAL, CDP
Director of Workforce Solutions



1

About Me

- Licensed Nursing Home Administrator, Certified Exec. for Assisted Living, and Certified Dementia Practitioner
- Spent 9+ years in operations in Skilled Nursing centers and Assisted Livings
- Started my career in Social Services, Discharge Planning, Admissions and Marketing prior to Executive Director and Administrator
- Passionate about improving long-term care
- Passionate about sharing ideas and experiences--no regulation talk, just good conversation!



2

Objectives

- Define exceptional customer experience in senior living
- Walk the full journey: inquiry to admissions to daily life
- Identify common breakdown points
- Build a culture where service is the standard, not the exception



**This is about moving from reactive service to intentional experience design

3

Why This Matters

- Customer experience = occupancy driver
- Families choose based on *trust + feeling*
- Reputation spreads instantly
 - You have a reputation, whether or not you manage it
- Your experience starts long before your front door- it starts *online, on the phone, and through word of mouth*



85% of families make a senior living decision before ever stepping foot in your community

4

Today's Decision Maker

- Adult children are the *primary* decision-makers
- Emotional + overwhelmed
- Balancing urgency and responsibility
- They are looking for one thing: *peace of mind*



80% of family members are actively involved in caregiving, many spending 10+ hours per week

5

What Families Really Care About

- How staff treat residents
- *Feeling* of the community
- Studies show families are less focused on technical metrics and more focused on:
 - "Will my loved one be treated with kindness?"
 - "Will they be happy here?"
- Trust, dignity, and respect



**This is customer experience-- not just care delivery

6

What Does "Exceptional" Look Like?

Exceptional is not one, great moment-- it is consistency across **every moment**

Consistent

Personalized

Proactive

Emotionally Intelligent

7

The Customer Journey

```
graph LR; A[Inquiry] --> B[Tour]; B --> C[Decision]; D[Move-In] --> E[First 30 Days]; E --> F[Ongoing Experience]
```

Every single one of these moments either builds trust... or breaks it

8

The Inquiry and Preadmission Process

9

The Inquiry

- The preadmission process
- This will **set the tone** for the rest of the admissions journey *and beyond*
- Your chance to make a positive first impression
- Starts with inquiry management
 - Walk-in
 - Phone call
 - Website
 - Referral from a hospital/SNF



10

The Inquiry

- Who should know how to handle an inquiry (*no matter the type*)?
 - Do you have processes in place during business hours? During a crisis (State in the building)? Evening and off-shift hours? Weekends?
 - I worked with a community where calls were going to voicemail if the receptionist was away
 - Families never called back and assumed "if they do not answer the phone now, how will they care for my mom and be available when I am concerned"
 - Inquiry forms at reception, manager offices, and every nurse's station
 - At the **MINIMUM** get a name and a phone number
- **Scripts do not matter as much as tone

11

The Preadmission Process

- Information gathering during the initial meeting is **crucial**
- This is where you are ensuring the prospective resident is appropriate for the community
 - At the community
 - Visit at home
 - At the SNF/hospital
- Get **AS MUCH** information as you can- the more you have, the better you will be able to prepare for admission
- Clinical information, hobbies, likes/dislikes, basic demographics, favorite foods, etc.
- Talk to the potential resident (if able), family members, caregivers, nurses, therapists-- anyone involved in the overall care

12

The Preadmission Process

- Clinical information
 - Do not cut corners here
 - This can make or break the resident experience from Day 1-- nothing is worse than telling a resident or family member that you can care for them or their loved one, and you cannot meet their level of care-- be honest about how the community can meet clinical needs, even if challenges exist
 - You may receive a referral with this admissions, but **always** confirm accuracy during assessment



13

The Preadmission Process

- Develop expectations from the resident and family, as well as the community-- this is the epitome of good customer service
- Explain what Level of Care assessments are and how you will communicate changes
- Set room rates and payment expectations
 - Review the factors that may affect a room rate:
 - Care needs and services (i.e., memory care)
 - Size of living unit

14

The Tour

- If it is a scheduled tour, review the information prior to the actual tour (background, needs, and preferences)
- Check the community and main tour areas
 - Ensure everything is clean, smells good, and presents well
 - Nothing is worse than walking into the model room and the bed looks like someone slept in it, the blinds are shut, etc.



15

The Tour

- Have a system in place to alert floor staff that there is a tour with a prospective resident/family
 - Could be as simple as carrying a different colored clipboard- when staff sees you or your team walking around with it, they know it is a prospective resident/family
- Ensure the receptionist (or whoever will be the first person they see when they walk into the community) is aware of the tour, and understands the proper way to greet them
- Offer refreshments or a comfortable space for an introductory conversation.
- Set expectations for the tour and ask if there are specific areas or features, they'd like to see.

16

The Tour

- Tailor the tour to highlight aspects of the community that align with their interests
 - **Not every tour should be the exact same**
 - If they enjoy gardening, show the outdoor gardening space and opportunities
 - If they enjoy reading, show them the library
- Stop selling the building-- start telling the story of what life looks like here
 - Use examples of how the community meets individual needs, such as sharing stories about residents with similar interests.
- Emphasize safety features, accessibility, and any recent updates or renovations

17

The Tour

- When possible, introduce key team members (i.e., care staff, dining staff, managers, etc.)
- Share resident testimonials or encourage casual interaction with residents to convey a sense of community
- Utilize your resident ambassadors!
- Show active engagement in activities or dining room if time allows



18

The Tour

- Conclude with a positive impression
 - End the tour in a warm, inviting area, such as a lounge or model apartment
 - Offer a small token (i.e., brochure, gift bag, dining voucher) as a takeaway
- Follow-up promptly
 - Silence after a tour creates doubt
 - Send a thank-you message
 - Make it personalized with highlights of what was discussed during the tour-- show them you paid attention
 - Include answers to any unresolved questions and invite them to return for another visit or event

19

Preparing for Admission and Admission Day

20

Preparing for Admission

- All departments should know about an admission..... why?
 - Do this through team huddles, memos, etc.
- Ensure resident apartment is checked **prior to admission**
- Allow family adequate time to move in belongings; sometimes this happens a few days before resident moves in
 - Consider providing a checklist of items to bring



21

Preparing for Admission

- If you can have the admission paperwork/packet completed with the resident and/or responsible party prior to admission, then do it!
- It can be extremely overwhelming to try to do this all on admission day
- This is one of the scariest days of this person's life..... why?
 - Give them as much information as possible about what will be most important
 - Dining experience-- where, when, and how
 - Activities-- where, when, and how

22

Admission Day

- Team huddle to review admission time and information within all departments
- Welcome sign at the front desk (goes a LONG way)
- Provide a meaningful welcome gift
- Pre-assign their seat in the dining room or set up lunch with the ambassadors; make sure they receive a meal!
- Utilize activities to keep resident active, but not overwhelmed-- do not pressure them, but offer it so they are not sitting and watching all their belongings move into this new, much smaller space



23

The First 30 Days

24

The Make-or-Break Window

- The first 30 days are not just an adjustment period.... they are a **decision validation period**
- Trust is **fragile**-- "Did I make the right choice?"
 - This question is not just asked once; it is asked repeatedly- over and over again
 - After the first night
 - After the first meal
 - After the first concern
 - After the first miscommunication
- Residents are at their **highest emotional risk period** for experience depression and social isolation
- If we are not actively reinforcing their decision, they will start to doubt us, which leads to complaints, anxiety, and potential move-outs---- it is about **earning trust repeatedly**

25

What Families are Experiencing

- Fear-- "are they being cared for?"
- Guilt-- "did I abandon them?"
- Hyper-awareness of issues-- they are watching **everything**
 - Is my loved one eating?
 - Are they being acknowledged?
 - Are the staff kind?
 - Constant comparison to their expectations
- Small issues feel **REALLY big** during this time
 - A delayed response...
 - A missed greeting...
 - A lack of communication...
 - These are not minor inconveniences-- they are interpreted as "maybe this isn't the right place"



26

Proactive Communication Strategy

- Families often get labeled as "difficult"
- Silence creates doubt
- If families do not hear from you, they fill in the gaps themselves... rarely positively
- Communication needs to be **structured and intentional**
 - Day 1: "How did today feel for you?"
 - First 72 hours: "Here is how your loved one is adjusting"
 - Weekly: "Here is what we are seeing and working on"
- Don't wait for problems to communicate; communicate so problems don't escalate



27

Experience vs Expectations Gap

- Expectation vs reality = satisfaction level
- Customer satisfaction is not about being perfect, it is about alignment

The diagram illustrates the 'Experience vs Expectations Gap'. It features two blue, stepped blocks. The left block is labeled 'Expectation' and the right block is labeled 'Experience'. A horizontal dashed line connects the top edges of the two blocks. Below this dashed line is a double-headed arrow, and above it is the word 'Dissatisfaction', indicating the gap between what was expected and what was actually experienced.

28

Experience vs Expectations Gap

- We have two responsibilities
 - ★ Set realistic expectations
 - ★ Consistently meet those or exceed them
- Overpromising is one of the biggest risks
- After move-in... reality always shows up

The slide lists two responsibilities: setting realistic expectations and consistently meeting or exceeding them. It also notes that overpromising is a major risk and that reality often falls short after a move-in. A lightbulb icon with an exclamation mark is positioned to the right of the text.

29

Service Recovery Framework

The Service Recovery Framework is a five-step process:

- Acknowledge**: "I understand why this is frustrating"
- Apologize**: Not defensively. Not conditionally
- Act**: What are you doing to fix it right now?
- Follow-up**: Don't assume it is resolved-- confirm it
- Prevent**: Explain **how** it won't happen again

 The final step, 'Prevent', is equated to **TRUST**, with the question: "Can I trust this won't keep happening?"

30

Brand Experience

31

Everyday Moments= Brand Experience

- Your brand is not your marketing
- Your brand is what happens at 2:00PM on a Tuesday
- It is:
 - How staff speak to residents
 - Whether someone pauses to listen
 - Whether needs are anticipated
- **Consistency in small moments** beats occasional big moments
 - Care interactions
 - Dining experience
 - Responsiveness
 - Emotional connection

32

The Shift in Mindset

- It is easy to become task-driven in senior living, in fact, we are incredibly good at completing tasks; we are trained to:
 - Pass meds
 - Assist with ADLs
 - Complete charting
 - Serve meals
- But families are not evaluating your task completion-- they are evaluating the experience around those tasks and how it feels when they do it

**The shift= transforming the delivery of what we do

33

The Shift in Mindset



A task says "I need to get this done"
 A relationship says "I see you as a person"
 Same action-- completely different experience

- Example: helping a resident get dressed
 - Task-focused approach: in and out quickly, minimal conversation, focus on completion
 - Relationship-focused approach: "Good morning, how did you sleep?", "Do you want to wear your blue sweater today?", engaging, acknowledging, and connecting
 - The outcome is the same-- the resident gets dressed; the experience is different
- As leaders, we must ask: *are we rewarding speed or connection?* Because staff will prioritize what we measure and reinforce

34

The Shift in Mindset



Processes are necessary; they create consistency, safety, and structure
 If we rely on processes alone, we lose the human element

- Example: the dining experience
 - Process-driven: everyone served the same way, same script, same timing
 - Personalized: "I know you like your coffee before breakfast, let me grab that for you," "You didn't love this yesterday, want to try something different?"
 - Same dining room, completely different experience
- Families do not say "wow, their processes are amazing," they say, "they really know my mom," and **that** is personalization

35

The Shift in Mindset



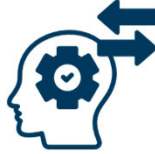
This is the hardest one because efficiency is important; we are short-staffed and busy
 The danger is that when efficiency becomes the priority, connection disappears

- Example: a resident says "hi" to a staff member in the hallway
 - Efficiency mindset: keeps walking and says "I will come back later"
 - Connection mindset: pauses for 10 seconds and says "Hi, how are you today?"
 - That 10 seconds is **connection**
- You can be efficient and still create connection, but if you are *only* efficient, you may never create connection

36

The Shift in Mindset

- We are not asking staff to do more work
- We are asking them to do the same work... differently
 - With intention
 - With presence
 - With awareness
- And here is the key: if we want our teams to deliver this kind of experience consistently, then it must be built into our culture, not left up to chance



37

Leadership and Culture

38

Culture is the Difference

- Culture= what happens when no one is watching
- What happens when leaders are not in the building? That is your culture
- If your team defaults to rushing, minimal interaction, and task completion, then that is your culture
- If they default to connection, empathy, and ownership, then that is your culture
- **Culture is what is consistently demonstrated**



39

The Standard

- What you tolerate= the standard
- Ignored behavior becomes accepted behavior; every time you walk past something, you are setting a standard
- Inconsistent enforcement creates confusion; if nothing is addressed, you are saying "that is acceptable"
- Culture is not built in big moments; **It is built in what you allow every single day**

**To note, most of this sounds REALLY OBVIOUS to us as leaders

40

Customer Service Playbook

- Giving residents full attention- not talking around residents (dining room included), but including them in conversation and explaining the care that is being provided
- Not being on phones in resident common areas
- Being mindful of nonverbal communication
 - The most **overlooked** part of communication
 - Smile when walking through resident common areas
- Say hello to people when they walk by in hallways and resident common areas
- Not sharing with residents, the potential frustration of being short-staffed
- Being mindful of noise levels, especially at night
- It is everyone's responsibility to answer a call light... how?

41

Hiring for Culture

- You can train for skill, but you cannot train someone to care
- You do not build a service culture through training alone...you build it by **who you allow on your team**
- Empathy, patience, and emotional intelligence are difficult to teach
- We must shift hiring from "Can they do the job?" to "How will they do the job?"
- **The walkaround** - how do they interact with residents? Other staff? What is their tone? Body language?



42

Hiring for Culture

- "Tell me about a time you cared for or helped someone who was upset, anxious, or difficult. What did you do?"
- "Tell me about a time you went out of your way for someone—even when it wasn't required."
- "What does 'great service' mean to you in your role?"
- "If you're having a busy day and a resident wants to talk, what do you do?"
- "Why did you choose to work in senior living?"
- "A resident is having a bad day and refuses care—what do you do?"

43

Hiring for Culture



44

Fostering the Culture

- Orientation and training- who is reviewing the customer service expectations of the community with new hires during orientation and training?
- Culture is not just built through orientation and training, it is built **daily** through reinforcement
- Continues through all-staff meetings and ongoing training
- Ask yourself, "Have I made it easy for my team to succeed?" Staff cannot deliver great service if:
 - They are afraid to make decisions
 - They feel unsupported
 - They are overwhelmed

45

Starts with Leadership

- Not only do they need to reinforce expectations, but they also need to demonstrate them
- Start morning meetings with a customer service success story or best practice
- Consistent accountability is paramount
- Rounding with **intention**
- Coaching in real-time
 - Don't punish
 - Address behavior quickly
 - Tie actions to impact
- Example: instead of saying "you need to do better" say "when we do not acknowledge residents, it makes them feel invisible"



46

Leadership Challenge

Would you choose your community?

If you walked into your building today - as a daughter, son, spouse - would you feel peace? Would you feel confidence? Would you feel that *this is where my loved one should be*?



47

Conclusion

48

Action Items

Start here...

- Audit your current customer service journey (especially the first 30 days)
- Implement a proactive communication plan for new residents and families
- Define what "exceptional service" looks like in **your community**

Then... build the culture

- Train hiring managers on hiring for empathy, not just experience/tasks
- Reinforce expectations daily (huddles, rounding, recognition)
- Address service gaps in **real-time**

49

Gina Mancini, LNHA, CEAL, CDP

Director of Workforce Solutions- LeaderStat



gmancini@leaderstat.com



330-881-2182



Connect with me!!



50