

WHITE PAPER

Welcome to the Yardi Senior CRM Road Show:

Lessons, Learning and More
in Six Cities



SENIOR HOUSING NEWS



Welcome to the Yardi Senior CRM Road Show:

Lessons, Learning and More in Six Cities

As questions arise about the value of customer relationship management (CRM) in today's senior living market, the operators who are the most data-forward understand just how valuable a CRM tool is for conversion performance.

But even connected operators face CRM challenges.

To hear those challenges, Yardi is taking the phrase “meet them where they are” literally, travelling throughout the U.S. and Canada to talk to operators about their needs, their goals and how they can achieve success with their technology platforms.

Welcome to the Yardi Senior CRM Road Show. Since the fall of 2025, the Road Show has visited six cities. This white paper dives into the journeys of four operators as they continue to build wins through their CRM, and the experiences they had meeting the Yardi team — and their fellow operators — at the Road Show in person.

With insights from:



Commonwealth Senior Living

Commonwealth Senior Living

ROAD SHOW ATTENDED:
Atlanta, GA | October 2025



Chartwell Retirement Residences

ROAD SHOW ATTENDED:
Toronto, ON | November 2025



Silverado Senior Living

ROAD SHOW ATTENDED:
Irvine, CA | March 2026



Brightwater Senior Living

ROAD SHOW ATTENDED:
Portland, OR | March 2026

Inside the State of CRM:

What four operators are seeing, and why they sought out the Yardi Senior CRM Road Show

News today around senior living CRM capabilities is often negative, suggesting a market at maturity and the slowing of traditional gains. That may well be true for some, but the experience of the four operators in this white paper tells another story. Benefits continue to build, even in the face of challenges.

The array of challenges, mixed with their positive experiences with Yardi, led each of these operators to attend the Yardi Senior CRM Road Show. A look at their respective experiences reveals the importance of having a strong CRM partner.

Data is the language of business. That's hard enough as it is. It's even harder when the data comes from multiple languages.

"We are a very complex customer, operating in four provinces and two languages," says Senior Director of Sales Strategy Amanda Richards about the Canadian-based Chartwell, which serves seniors in Ontario, Quebec, Alberta and British Columbia. "So, everything we do with Yardi has to be fully bilingual. They accommodate that."

Along with the language challenge, Chartwell has a more traditional size challenge. Their growth — a combination of acquisitions and new builds — has produced a lot of data.

"We've changed how we capture data over time and how we review it, analyze it and use it," Richards says. "That's where Yardi's been a great partner, because we're constantly looking at things a little bit differently and coming up with new ways that we want to see things. They've been very flexible with us, very adaptable with us, and very patient."

Chartwell Retirement Residences

By the numbers: 170 properties and over 25,000 seniors across four Canadian provinces

Yardi client since: 2004

Key challenge: A big offering — and a multi-lingual one



Amanda Richards
Senior Director of Sales Strategy, Chartwell

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Senior Director of Sales Strategy
Chartwell

Inside the State of CRM:

What four operators are seeing, and why they sought out the Yardi Senior CRM Road Show (continued)

When Silverado was getting started with Yardi, the custom reporting capabilities were less than what the operator wanted.

“The CRM at Yardi was a great tool to do the blocking and tackling of pipeline management and accountability for our sales team,” says Jeffrey Frum, SVP of Sales and Marketing. Yet they would often manually pull data from the CRM and place it in Excel spreadsheets to create their own reports. “That required a little extra effort on our part, but we got what we needed, and it was fine. We presented those challenges to Yardi over the years, and Yardi responded.”

Silverado Senior Living

By the numbers: 27 communities / 2,374 units

Yardi client since: 2008

Key challenge: Custom reporting and the struggle of manual work



Jeffrey Frum

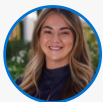
SVP of Sales and Marketing, Silverado

Brightwater Senior Living

By the numbers: 17 communities across the U.S. and Canada

Yardi client since: 2016

Key challenge: Connecting with prospective residents



Cassandra Grisar

Sr. Director of Marketing & Brand Awareness, Brightwater

“In previous years, a challenge with the CRM may have been being able to easily do bulk functions of connecting with your prospective residents,” says Cassandra Grisar, Senior Director of Marketing & Brand Awareness. That’s a problem that Yardi has solved, much to Brightwater’s benefit.

“Yardi has built out a lot of graphs that make it accessible and easy for us to pull data to help us analyze the return on a lot of the marketing efforts, and where we’re going to be with occupancy,” Grisar says. “Those are some enhancements that we’ve seen in the CRM that are really helpful for us — usage from previous times to where we’re at now.”

Inside the State of CRM:

What four operators are seeing, and why they sought out the Yardi Senior CRM Road Show (continued)

Every senior living community has challenges, but in a world where some in the industry struggle to know the value of their CRM, the team at Commonwealth views the ROI as self-evident.

“Our partnership with Yardi yields great CRM results,” says Taylor Davis, Director of Marketing & Digital Strategy.

Commonwealth Senior Living

By the numbers: 35 communities / 2,918 units

Yardi client since: 2013

Key challenge: None!



Taylor Davis

Director of Marketing & Digital Strategy,
Commonwealth



Yardi appreciates the great conversations and insights from Cassandra Grisar and Traci Still from Brightwater Senior Living Group, LLC, Sidneigh Barks, Staci Hardy, Corneil Vacirca and Lisa Detweiler from Merrill Gardens, Sidarany Philips from CSL BERKSHIRE OPERATING COMPANY/Clearwater Living and Jodi Roberts from Senior Services Of America.

Why Personalization Matters

How leading organizations are adapting to CRM challenges — and how they are getting the most out of their CRM

A big part of how these four operators get the most from their CRM is their collaborative partnership with Yardi. Here's a look at how Yardi personalized their CRM experiences, and the big wins that followed.

Commonwealth: Big wins with “lead stages”

In September of 2025, Commonwealth joined the many operators that use Yardi's “lead stages” approach to sales, a prospect-centered strategy whose flexibility makes it more effective than a standard buying journey. **In just their first quarter of use, from Q3 to Q4, Commonwealth saw:**

- **5% increase** in inquiry-to-tour
- **3% increase** in tour-to-move in
- **2% increase** in inquiry-to-move in

“These were all positive results,” says Kristy Ruppe Craddock, Chief Sales & Marketing Officer at Commonwealth. “Yardi has been a great partner in listening to our feedback and working with us to create custom reports and dashboards for our organization, specifically to help us measure in areas where we know we are looking to improve.”

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Kristy Ruppe Craddock

Chief Sales & Marketing Officer
Commonwealth

Chartwell: Tracking referral sources

As Chartwell expands its communication with Yardi, the operator sees more of its staff members regularly using their CRM, which improves the data they pull from the system. They've then been able to give Yardi better feedback, which leads Yardi to continue making improvements based on Chartwell's needs, especially around referrals.

“We can now track and identify which referral partners are generating the biggest outcomes in terms of initial contacts and tours and permanent move-ins,” Richards says. “We then adjust our strategies so that we're working more closely with the people who are driving results, and we're moving away from the ones that aren't. That's been a really big gain, and it offers a lot of transparency and visibility for that strategy.”

Why Personalization Matters

How leading organizations are adapting to CRM challenges — and how they are getting the most out of their CRM (continued)

Silverado: Personalized training on Senior IQ dashboards

Silverado found great benefits in Yardi's Senior IQ dashboards, and Yardi's personalized training around those capabilities.

"Senior IQ and the dashboards that we created gave us flexibility, and Yardi gave us the training so that we could create unique, custom dashboards to reflect the data we need to run our business," Frum says. Yardi ensured that Silverado had quick and easy access to the KPIs most tied to "the health of our businesses across the board," from clinical to sales to census to accounts receivable and residents that are given a 30-day notice.

"That was a great solution that we had a lot of fun building out and playing with and training our teams," Frum says.

Brightwater: 96% occupancy through "trifecta" of partners

CRM is meant for collaboration. As Brightwater has seen, Yardi's commitment to collaboration extends to work with other Brightwater partners.

Brightwater's huge occupancy gains, in part from its Yardi partnership: **86% to 96%.**

Over the past year and a half, Brightwater has seen a company-wide jump in occupancy, from about 86% to a whopping 96%. Grisar credits the collaboration of Brightwater's "trifecta" of partners.

"My three biggest partners are Yardi, Markentum and FURTHER," she says. "We implemented and utilized the tools from all three companies, with Yardi a big factor as we upgraded our CRM."

Grisar sees her team able to nurture their leads, which has driven their occupancy growth. This is part of what makes Yardi "user-friendly," she notes, both for the leadership team and the community teams.

"Of course we'd like 100% occupancy with the wait list, but we are in a very comfortable position where we can now focus on pushing revenue," she says. "We've got the occupancy. And so our shift this year is maintaining and growing while also pushing the revenue. That's a focal point for us this year."

Between the CRM and business gains, the personalized treatment from Yardi and the desire to learn more, Davis, Richards, Frum and Grisar were all enthusiastic when they heard about Yardi's newest venture: the Senior CRM Road Show.

And in late 2025 and early 2026, all four sought out this new event.

Live From The Yardi Senior CRM Road Show

Lessons learned and actionable insights activated

In late 2025, Yardi CRM Manager Candace Seidle began putting the word out to operators: Yardi was on the way to see them.

“Candace knows that we’re always open and willing to try new opportunities to help our organization grow, and I thought it would be a great fit for us to come to the first one and see everyone in person versus just over a screen,” Davis says. Adds Grisar: “The Road Show would be great for me to revisit what Yardi has to offer and also great for our team members to gain knowledge and get more familiar with Yardi.”

And so, in October of 2025, Davis of the Charlottesville, Virginia-based Commonwealth headed southwest to Atlanta and the first ever Yardi Senior CRM Road Show. Richards of the Canadian Chartwell met up with Yardi in Toronto in November. In March of 2026, Frum headed a bit west from inland California to Irvine, while Grisar and a Brightwater teammate drove two hours from Bend, Oregon to Portland.

All four walked away with incredible insights and actionable lessons. Here’s a look at why they went, what they learned — and why they’ll be back.

Commonwealth at the Yardi Senior CRM Road Show

Atlanta, October 2025

Lessons learned: Deeper insights into lead stages



The CRM Road Show began with a presentation, one Davis describes as “very conversational.” Particularly valuable were additional lessons in lead stages, where Commonwealth had already gained huge boosts. Davis was able to connect in person with both Seidle and with team members from FURTHER who helped improve their lead stages experience.

“One of the things CSL realized at the Road Show is that FURTHER can utilize their lead stages for their marketing campaigns,” Seidle says. “I don’t think that was super clear before — how to leverage lead stages in a marketing campaign.”

Live From The Yardi Senior CRM Road Show

Lessons learned and actionable insights activated (continued)

In Toronto, Richards and Chartwell spent a lot of time talking about the next iterations of Senior CRM and how it would fit into their organization moving forward.

Chartwell at the Yardi Senior CRM Road Show

Toronto, November 2025

Lessons learned: Updating their wait-list strategy



“The Road Show really helped to frame our strategic decisions,” she says. “We looked at it as an opportunity to dive into the new products and look at everything, and then we went back with very specific things that we needed to look at.”

As soon as they returned to their office, Chartwell’s team got to work on steps to improve:

- A database analysis to clean their data
- Importing new data into version 8 of the Senior CRM

“Immediately we were able to come back and update our wait-list strategy,” Richards says. The insights they gained at the Road Show helped their team add new KPIs to their dashboard, while fusing their wait lists from one internal and one external to simply one list.

“That was a quick win for us,” she says. “Also, we had those conversations around tracking all of our calls and handling everything on the AI side as we start to lean into what Voyager 8 Senior CRM has to offer. Now we’re having those conversations and looping in our call center and looping in our resident experience teams to see what we’re going to do next.”

“

The Road Show really helped to frame our strategic decisions.

We looked at it as an opportunity to dive into the new products and look at everything, and then we went back with very specific things that we needed to look at.”

Amanda Richards

Senior Director of Sales Strategy
Chartwell

Live From The Yardi Senior CRM Road Show

Lessons learned and actionable insights activated (continued)

Frum came out of the Yardi Senior CRM Road Show with new ideas for CRM functionality that Silverado will “launch over the coming months,” along with insights into AI advancements that are “exciting for the future.”

Silverado at the Yardi Senior CRM Road Show

Irvine, March 2026

Lessons learned: A roadmap for new functionality — and greater appreciation as a Yardi customer



But more than any one technology benefit was a deep feeling of being part of a Yardi community.

“I came out of it with more one-on-one attention than I ever thought I would get,” Frum says. He spent four hours at the Road Show, having detailed conversations with Seidle about the Silverado business. He also came away with new industry contacts.

“**I felt appreciated as a customer.** They had authentic support, and it’s cool to hear what’s going on personally, not just in an audience.”

Jeffrey Frum

SVP of Sales and Marketing
Silverado

“The one-on-one attention and the small group environment — that to me was a great investment of my time,” he says. “I felt appreciated as a customer. They had authentic support, and it’s cool to hear what’s going on personally, not just in an audience. At conferences, you can get several hundred people in a room and hear a topic on a subset of what you’re working on. But the Road Show was a more intimate environment.”

Live From The Yardi Senior CRM Road Show

Lessons learned and actionable insights activated (continued)

Grisar's experience was like Frum's: The actionable insights were great, while the long-term soft benefits were even better.

Brightwater at the Yardi Senior CRM Road Show

Portland, March 2026



Lessons learned: Put yourself at the forefront of innovation

"When we left, we felt really good about the time we invested to go there and walked away with information that was going to be really beneficial to us," Grisar says. "We were so happy. You never know what to expect when you go to these functions, and we were driving home talking about implementing these new ideas."

Her top lesson went beyond one innovation or another.

"The top lesson for me is staying the squeaky wheel and constantly reaching out to Candace to pilot these things," she says. "I need to do a better job at staying closer so that I can be one of the pilot users. I love to pilot things!"

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Cassandra Grisar

Senior Director of Marketing &
Brand Awareness
Brightwater



Kristen Arnold, Amanda Richards, Marielle Santos and Meggyn Trotter enjoying the Yardi Senior CRM Road Show in Toronto, November 2025.

Come find Yardi in your town

The spring of 2026 brought two more Road Shows, one in Dallas, one in Raleigh, North Carolina. That means more operators learned what Davis, Richards, Frum and Grisar learned: Yardi is here to build with you.

With the success of the Senior CRM Road Show, Yardi is expanding the concept in 2026 to better service customers beyond the marketing and sales side, adding care delivery with Yardi EHR.

By bringing together technologies that support both business development and care delivery, the Yardi Senior Living Road Show offers a more holistic approach, helping communities enhance resident outcomes, improve staff efficiency, streamline operations and deliver exceptional experiences at every stage of the resident journey.

All four operators are looking forward to returning to future stops on the Yardi Senior Living Road Show. Their final thoughts:



Davis: “Operators should absolutely be going to the Road Shows, whether they haven’t been to one or if they have. Take the initiative to find new opportunities with Yardi. We’ll definitely be going to another one.”



Richards: “I think you need to lean into your partnership with your CRM provider, which should be Yardi. Don’t wait for innovation to come to you — ask questions about what you want to see in your business. Inspire the innovation. That’s what we so appreciate about our partnership with Yardi.”



Frum: “We just acquired a community and we used Yardi’s transition team to transition them from their CRM into Yardi. We’re expanding rapidly at Silverado, with so many acquisitions in the pipeline. To have a partner that we know we can scale with, where we can just activate it, turn it on and have a support team pull other systems from these acquisitions into Yardi? That is incredibly helpful and means we can really move forward a lot quicker.”



Grisar: “I enjoyed everything about the Road Show. I have nothing but good things to say about our experience. It was great.”

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