



# BILD & CO

# Real Estate Capacity Management

[bildandco.com](https://bildandco.com)



# Bild & Co: Who We Are

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## Real Estate Consulting Firm Nixed In Senior Living, Active Adult, and Multifamily Capacity Management

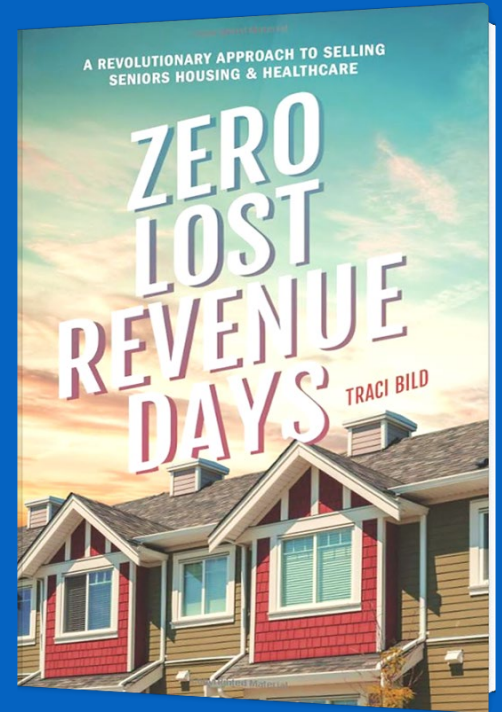
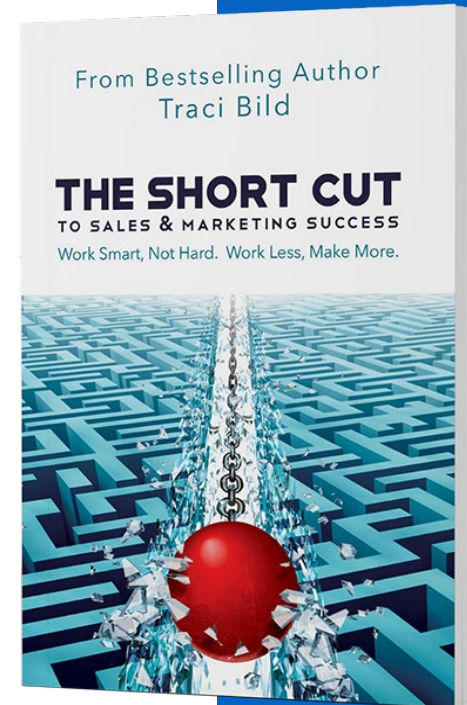
The Bild & Co team (est. 1999) works with owners, operators, and developers who seek to optimize financial performance for senior living, active adult, and multifamily real estate assets.

## Bild & Co is a team of performance experts and change specialists dedicated to helping our clients achieve their financial goals.

With deep real estate industry experience and a proven track record of success, we have the expertise to guide your business through any revenue challenge

## Where We Work:

The United States, The United Kingdom, and Canada.



Books by :  
**Traci Bild**

# Bild & Co: What We Do



## What We Do:

### Optimize Revenue & Financial Performance

Our expertise in marketing, operations, and sales allows us to create customized solutions that drive revenue and net operating income. We identify revenue and profitability gaps, create the strategy to close them, and work with corporate, regional, and site-level leadership to facilitate rapid change, resulting in optimized financial performance and the overall valuation of our client organizations.

### To accomplish client goals, we leverage one or all five divisions within Bild & Co to include:



**Bild Sales & Marketing:** Integration of sales and marketing with a data-driven approach that provides clear visibility into the metrics required to achieve financial goals.



**Bild Research:** Collect, analyze, and interpret real time market data, providing actionable insights that are rooted in facts.



**Bild Talent:** Recruit, onboard, and coach new talent as well as assessing existing teams and providing actionable growth plans to improve revenue performance.



**BILDx:** Powerful people enabled sales engagement platform to engage digital leads, schedule appointments, and consistently nurture and build a solid sales pipeline.

# Why Bild & Co?



**577+**  
Communities



**50**  
States



**180+**  
Property  
Scans



**100+**  
Companies



**3**  
Countries



**1500+**  
Competitive  
Analyses



**\$5.4B+**  
Client Revenue  
Growth

Unparalleled Expertise



**Great  
Place  
To  
Work®**

**Certified**  
DEC 2022-DEC 2023  
USA™



# Case Studies



# Revenue Growth Averages | 2022

Performance Results Across Bild Clientele Representing 24 Portfolios, 153 Assets

## Bild Consulting Clients:

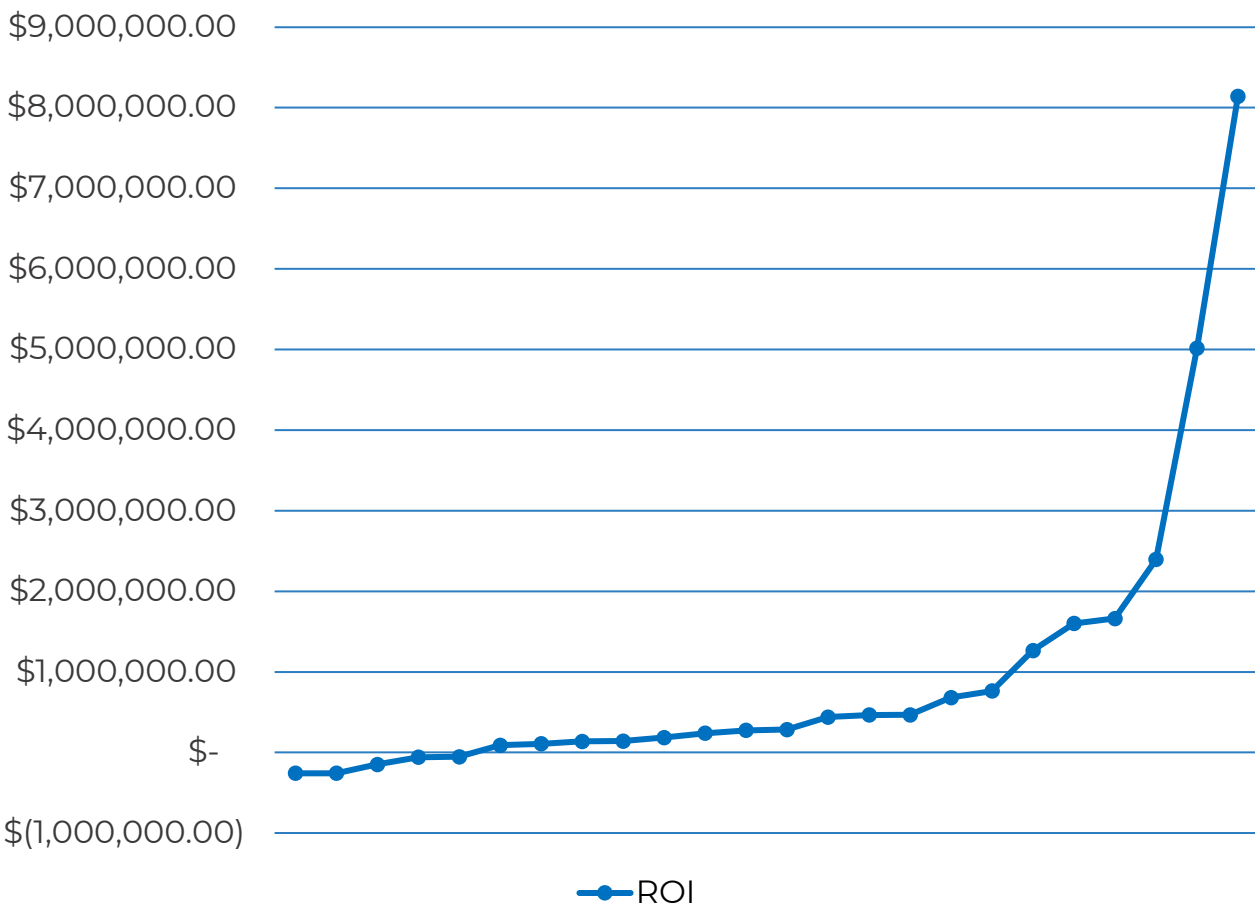
1Y average revenue growth  
**\$2,885,834**

6M average revenue growth  
**\$399,549**

3M average revenue growth  
**\$283,920**

Total Bild Client 2022 Revenue Growth Average  
**\$982,578**

\*Total 24 Clients (portfolios not assets)



## FOR PROFIT CLIENT SAMPLE



## OWNER CLIENT SAMPLE

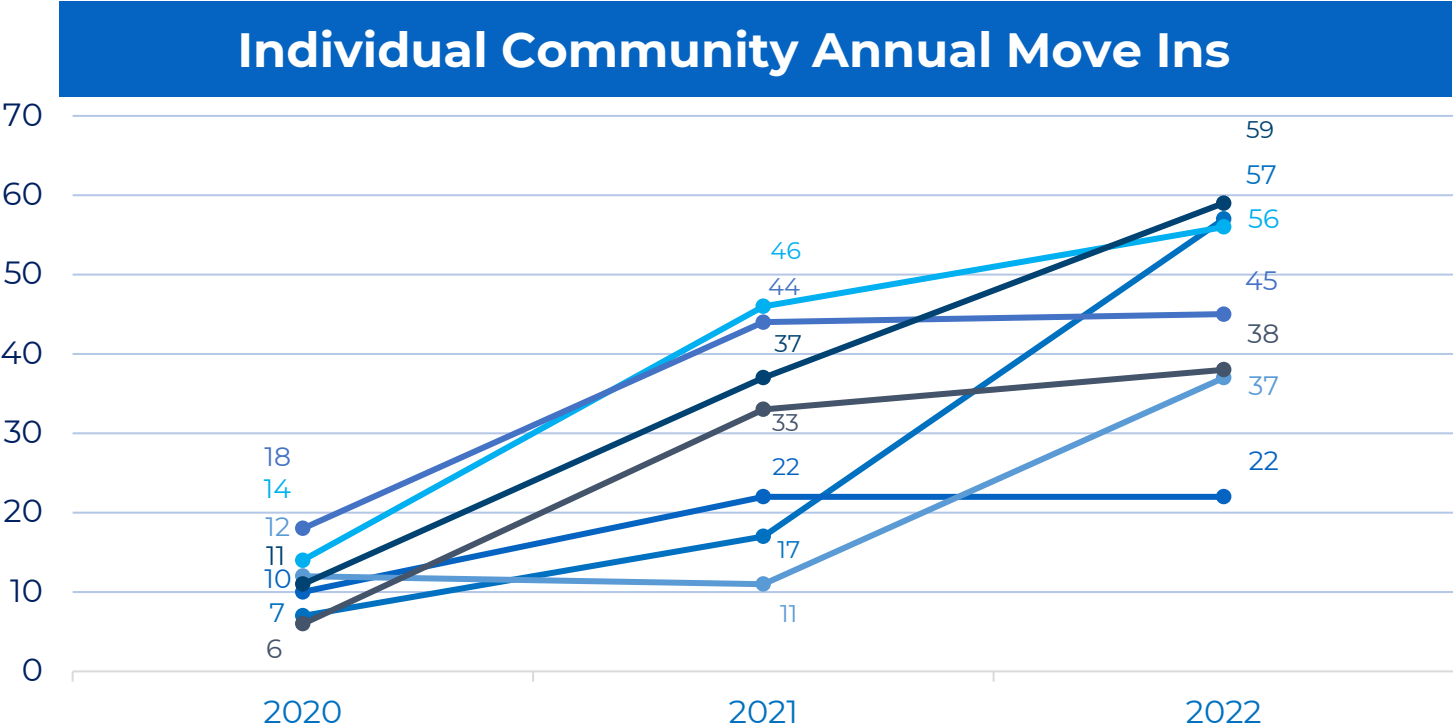


## SAMPLE CLIENTS WE CONSULTED TO DRIVE REVENUE PROIR TO SALE



# Case Study 1 | 2021 – 2022 CHIEF REVENUE OFFICER

SERVICES IMPLEMENTED: SERVED IN VPM & VPS ROLES, TALENT, MSA RESEARCH, BILD X



- 7 Coached Assets
- 2 Years Coaching

Client Growth AL/MC (3 states)		
	Average Monthly Revenue Growth	Average Monthly Unit Growth
2022	\$451,781	7
2021	\$134,344	2

## Client Summary:

Bild & Co began this engagement on behalf of the operator-investor. We launched a train the trainer type program with limited community support. When the VPS & VPM turned over, the Bild team assumed the VPSM role acting as the chief revenue officer. This client had a **236% revenue increase in 2022** compared to 2021. In 2022, they saw an average monthly occupancy **growth of 8% across the portfolio per location**.

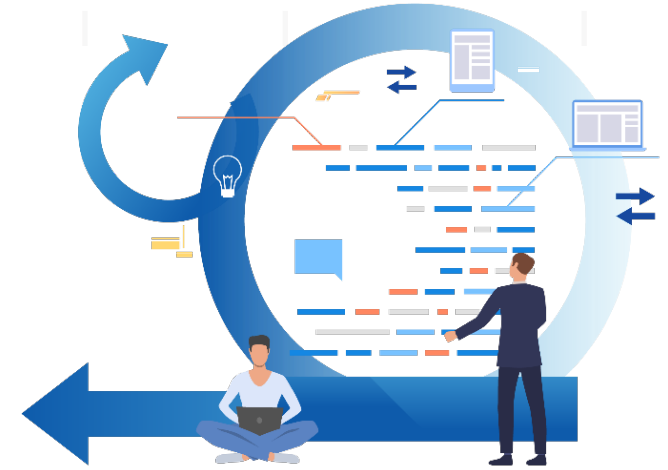




# Services Implemented In

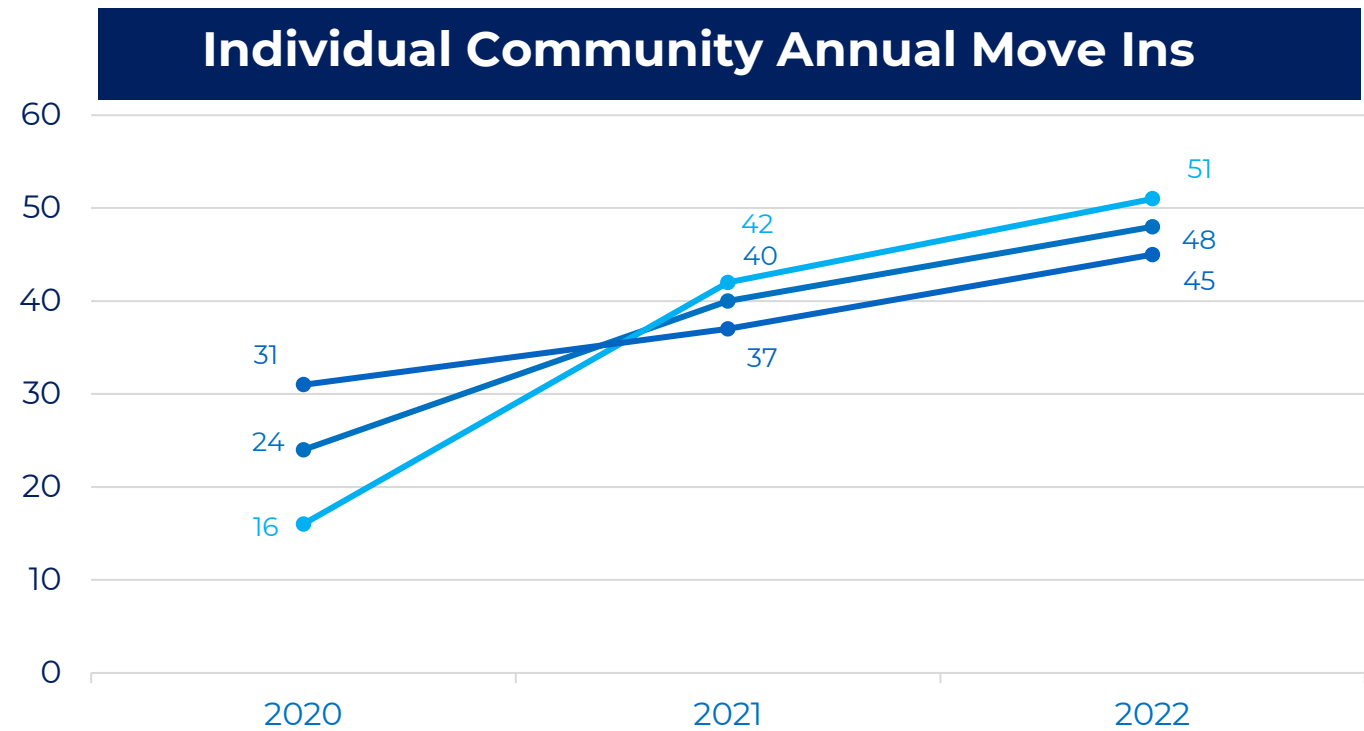
## Scope Of Case Study 1

- ✓ Weekly **leadership** calls with ops, nursing, finance, and sales
- ✓ Seminar and academy training
- ✓ Group and individual coaching for **EDs and CRDs**
- ✓ Weekly sales pipeline review
- ✓ Weekly **motivation emails, videos, etc.**
- ✓ Daily CRM review and feedback to community teams to manage leads and build a strong pipeline
- ✓ **Onsite support each month** to underperforming communities
- ✓ Mystery shops to gauge the buyer experience and speed to lead; inspect expectations
- ✓ Employee, resident, and post **tour surveys**
- ✓ Marketing plans executed for events and outreach for each community
- ✓ Event flyers and invites for **professional referrals and lead generation**
- ✓ Social media audit and review with each location
- ✓ Monthly calls with marketing team to review digital leads and tweak digital strategy
- ✓ BILDx pilot program to increase speed to lead of **all digital leads and execute lead** follow up daily



# Case Study 2 | 2020 – 2022 COVID RECOVERY / CRO

SERVICES IMPLEMENTED: SALES & MARKETING, TALENT, RESEARCH



- 3 Coached Communities
- 10 Years Coaching

Client Revenue Growth: IL/AL/MC/CCRC		
	Average Monthly Revenue Growth	Average Monthly Unit Growth
2022	\$1,191,376	12
2021	\$789,036	10
2020	\$333,834	6

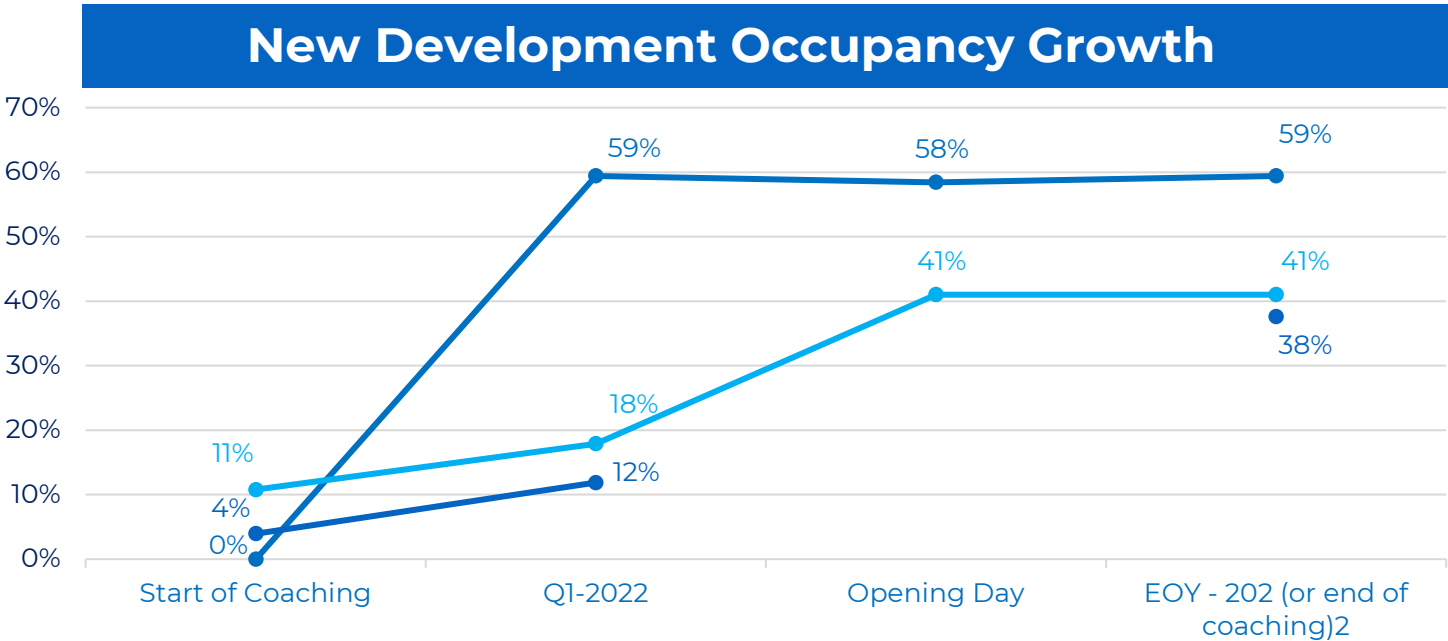
## Client Summary:

Client has entrusted Bild & Co the past 10 years to protect the revenue and cash flow of their business. As an acting chief revenue officer, this family-owned business relies on us to manage day to day sales, marketing, and operations. In this case study we show how quickly the client bounced back during COVID19. Buildings are dated and in undesirable areas.



# Case Study 3 | 2021 – 2022 NEW DEVELOPMENT LEASE UPS

SERVICES USED: BILD SALES & MARKETING, BILD TALENT, BILD RESEARCH



- 7 Coached Assets
- 2 Years Coaching

Client Growth IL/ AL/MC (2 states)		
	Total Revenue Growth	Total Unit Growth
2022	\$2,195,333	35*

## Client Summary:

Bild & Co represents the ownership and development group in this case study acting to protect their financial interest. We provided all sale, marketing, and operational support during pre-lease. In 2022, this client grew the portfolio of newly developed assets by 135 combined pre-lease and occupied units. Reference actual opening dates in the chart below.

*\* Count of deposits / move ins- some communities were not opened yet.*

### Location 1

- Started Coaching: 3/29/21
- Opened 1/1/22

### Location 2

- Started Coaching: 12/15/21
- Opened 11/1/22

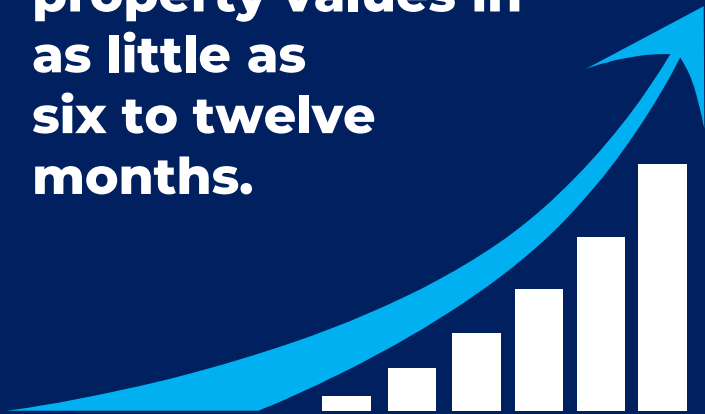
### Location 3

- Started Coaching: 1/6/2022
- Opened 2/1/23



# Bild & Co Capabilities

The Bild & Co team will maximize **profitability, improve cash flow, mitigate risk, and increase your property values in as little as six to twelve months.**



**Revenue Decline:**  
Stabilize assets and return them to profitability and growth

**Ownership Transition:**  
Protect revenue during a timely sales process to ensure retention of asset value while waiting on the sale to close.

**Underperforming Assets:**  
Turnaround assets and move toward full occupancy in as little as 12 months.

**Chief Revenue Officer:**  
Plug Bild into your executive team to ensure revenue performance and optimization portfolio-wide

**Preparation for a Capital Event:**  
Ensure assets meet priority benchmarks

**Value Add:**  
Optimize revenue and profitability for increased asset valuation

**High Growth Portfolios:**  
Protect the revenue of existing assets while expanding your operating footprint

**VPSM or Regional Sales Open Positions:**  
Maintain revenue focus by plugging in Bild & Co while proper candidates are put in place

# Bild & Co

## How to Engage Us & Fund Our Services

Client engagement can be supported in the following ways:



1. Fee for service  
**(estimated \$3,500 - \$5,000 per asset per month)**



2. Reduced fee (50%) in exchange for revenue share  
**(25%-75% of one month's increased revenue depending on performance results);**

based on increasing the velocity of move ins



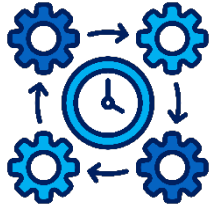
3. Piece of the promote:  
**New development lease ups, property acquisitions, or asset sales**





# Bild & Co Timelines

## Expectations



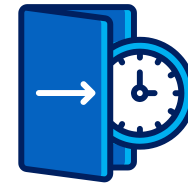
**1. Bild & Co's minimum engagement period is six months** while most are twelve to ensure full adoption of process implementation and results.



**2. Months 1-3:** Asset/portfolio assessment along with sales and marketing process implementation.



**3. Months 4-12:** Sales and marketing leadership, site level sales implementation, accountability, database management, and the development of strong pipelines for all assets. In these months we will see move ins and revenue increase month over month. As we move closer to our occupancy goals we strive to eliminate paid referral sources and to increase rate.



**4. Should an operator or asset fail to implement and or engage with our team,** we will exit the engagement within 45 days to ensure your investments are not wasted. Our team can partner with you to recruit new talent or hold while new hires are put in place.

# Our Leadership Team

When working with Bild & Co you gain access to a THINK TANK of expert team members who have been with Bild & Co on average for 10 years.

“Traci’s passion is to help real estate owners, operators, and developers widen their vision, dare to reinvent to optimize financial performance, strategic growth, and profitability.”



**Jennifer Saxman**  
CEO

**Traci Bild,**  
Chief Visionary  
Officer / Founder



“Jennifer seeks to transform the industry through real time solutions that are designed to solve the industries greatest financial challenges.”



# Our Leadership Team

“When working with Bild and Co, our brain power and expertise become yours”



**Jocelyn Schrader**

Director of Client Strategy  
& Operations

“Jocelyn has assessed over 200 assets providing invaluable expertise and insight into sales, operations, and marketing gaps.”



**Dana Asche**

President of Training

“Dana has overseen revenue optimization for 500+ clients with deep expertise in performance management to include sales, operations, and marketing integration.”



**Courtney Culver**

Director of Research

“Courtney oversees the execution of hundreds of competitive analysis, market shops, and surveys allowing us to answer your most pressing questions and to unlock your full revenue potential.”

# Thank You

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