

EXECUTIVE SUMMARY

BHI Senior Living, operating **12 Life Plan and Active Adult Communities** across Indiana, Michigan, and Ohio, partnered with The Smarter Service to address growing tech needs among residents and staff.

Following a successful pilot in three communities—resolving **600+ tech issues** and reclaiming **20% of staff time**—the program expanded enterprise-wide, offering this valuable Tech Concierge Support as a valuable amenity to their residents. Early results show a **3.4x ROI** per community, driven by operational efficiency, resident satisfaction, and staff focus.



600+
Tech issues
resolved

+20%
Staff time
reclaimed

3.4x
ROI

★★★★★
5/5
Sustained
customer
satisfaction

CHALLENGES

- Inconsistent tech support across communities
- Staff pulled into troubleshooting instead of caregiving
- Overspending in some locations; under-resourced in others
- Internal IT teams diverted from core infrastructure work

“We needed a consistent, high-quality tech solution without unpredictable costs.”

— **Elwood C III**, VP, Information Technology, BHI

“The Smarter Service allowed us to scale our support for residents to get the help they need, enabling IT to focus on broader initiatives across all communities..”



— **Elwood C III**, VP, Information Technology, BHI

OBJECTIVES

- ✓ **RESIDENT EMPOWERMENT:** Increase tech confidence & engagement
- ✓ **OPERATIONAL EFFICIENCY:** Reduce staff time spent on tech issues
- ✓ **SCALABLE MODEL:** Build a replicable service framework for all communities
- ✓ **DATA-DRIVEN DECISIONS:** Collect insights to shape future tech investments

SOLUTIONS

“This was the best idea I had heard in a long time.”
— Lynn B., Resident



TECH CONCIERGE

Deployed in 3 communities with onsite, in-home, and virtual support



CONSISTENT SUPPORT

Regular, reliable presence builds trust with residents



RESIDENT-FOCUSED APPROACH

Individual help, enrichment classes, and ongoing guidance



STRATEGIC COLLABORATION

Freed up IT teams for infrastructure and innovation projects

BUSINESS VALUE INSIGHTS

**3.4x
ROI**

labor recapture
+ increased engagement
+ IT project velocity

40% → 75%

Usage increase in
resident-facing
platforms (targeted)

300 → 2,200

Residents now
supported

62%

Base ROI:
immediate labor savings

★★★★★
5/5

Sustained customer
satisfaction

150+

Hours of support,
600+ tickets resolved

OUTCOMES



Expanded to all 12 communities based on pilot success



Improved staff focus on caregiving and strategic tasks



Increased resident confidence & platform adoption



Higher resident retention & attraction through tech-forward positioning



Ongoing insights through data collection and service logging

WHY IT WORKED



PERSONALIZED SUPPORT

One-on-one assistance tailored to resident needs



IN-PERSON AND ON CAMPUS

Building trust with residents, families & staff.



PREDICTABLE, SCALABLE MODEL

Reliable coverage across states and communities.



PARTNERSHIP WITH IT

Enabled BHI's internal team stay focused on strategic priorities



RETURNING STAFF TIME

Up to 20% staff time returned based on staff surveys



CONTINUOUS IMPROVEMENT

Real-time data tracking informed service refinements

“Communities are happy, residents are happy, and my staff is re-engaged in corporate tasks. Wins all around.”

— **Elwood C III**, VP, Information Technology, BHI

“[Our engagement platform] can connect residents to friends and to the broader community, enriching their lives as they integrate into the community. Greg is teaching them to use this, and they trust him. He is connecting them more fully to the community, while also taking this adoption off our plate, and giving back our time.”

— **Kara**, Executive Director

