

PLAYBOOK

Senior Living & Assisted Living

Handshake Outreach email sequence, adapted.

Four messages, one sequence. Mail-merge ready.

ADAPTATION 12

Category notes

Senior living has a trust problem rooted in emotional complexity rather than fraud. Families aren't shopping for a product — they're making a decision they've been dreading for months or years, often carrying guilt about "putting Mom in a home." The research phase is long and usually involves both an adult child and the prospective resident, whose interests and emotions may not align. The biggest recurring complaint from families: cost opacity. Communities advertise a base rate that almost never reflects the actual monthly cost. Level-of-care assessments, medication management fees, community fees, incontinence surcharges, and annual 3–6% rate increases can push the real cost 30–50% above the advertised number within the first year. The opportunity for an honest community is enormous: families are desperate for someone who will give them real numbers and treat the decision with the gravity it deserves.

Insider terms: ADLs (Activities of Daily Living — the specific tasks like bathing, dressing, toileting, transferring, and eating that determine care level), level-of-care assessment (the nursing evaluation that assigns a care tier and its associated cost), community fee (one-time move-in charge, often \$2,000–\$5,000, sometimes refundable, sometimes not), tiered pricing vs. all-inclusive pricing, memory care (specialized unit for dementia/Alzheimer's, significantly higher cost), respite stay (short-term trial stay), care plan, discharge planner (the hospital social worker who gives families a short list and a 48-hour deadline), aging life care manager (formerly geriatric care manager — an independent advocate families can hire), long-term care insurance, VA Aid & Attendance benefit, Medicaid waiver.

MESSAGE 1 OF 4 / SEND WITHIN 4-24 HOURS

Message 1: The Honest Hello

Acknowledge the cold contact. Defuse the sales-pitch dread. Give one useful piece of guidance.

Subject: A note from [First Name] at [Community] – not a sales pitch

Hi –

You stopped by [Community]'s website recently. If you're researching senior living options for someone you love, I know this isn't a casual search. It's one of the hardest decisions a family can make, and the last thing you need is a high-pressure intake call. I'm not going to make one.

I'm [Name], [role] at [Community]. I'm writing because I'd rather introduce myself once, honestly, than have you get a sequence of templated brochure requests.

One useful thing for someone in the research phase: before you tour any community – ours or anyone else's – ask for a written breakdown of every possible charge beyond the base rate. Specifically: What is the community fee and is any portion refundable? How are care levels assessed, how often are they reassessed, and what does each level cost? What does medication management cost? What triggers a move to memory care, and what does that cost? What has the average annual rate increase been for the past three years? If a community won't put those numbers in writing before your tour, that tells you something important.

I'll send two more notes – short, focused on the things worth knowing whether you ever visit [Community] or not. Easy unsubscribe.

– [Name]

[Direct line, reply-to]

MESSAGE 2 OF 4 / SEND 3-4 DAYS LATER

Message 2: The Inside Knowledge

The costly signal: name what families should ask about pricing — even at our cost.

Subject: The question that changes every senior living conversation (and most families never ask it)

[Name],

Following up. The most important question to ask any senior living community is this: "What will my parent's monthly cost be in eighteen months if care needs increase by one level?"

Most families ask about today's cost. They compare base rates across communities and assume the lowest number is the best deal. But in senior living, the base rate is just the starting point. The real financial picture depends on how care is priced as needs change — and they almost always change.

Here's what most brochures don't explain. Communities use one of three pricing models: tiered (you're assigned a care level and pay a flat rate for that tier), à la carte (each service — bathing assistance, medication management, incontinence care — is billed separately), or all-inclusive (one price covers everything regardless of care level). Each model has tradeoffs. Tiered pricing feels predictable until a reassessment bumps you to the next tier and adds \$800 to \$2,000 per month with little warning. À la carte sounds flexible but makes budgeting nearly impossible as needs evolve. All-inclusive costs more upfront but protects you from surprises.

The question that separates a transparent community from an opaque one: ask for a sample invoice at each care level, not just the one your loved one needs today. A community that can hand you that document without hesitation has nothing to hide. One that says "it depends" or "we assess individually" is telling you they don't want you to see the math until you've already signed.

[Community]'s full pricing guide — every care level, every add-on, every fee, with three years of actual rate-increase history — is at [link]. No form.

— [Name]

MESSAGE 3 OF 4 / SEND 5-7 DAYS LATER

Message 3: The Story

One real family with a trust breakdown. Predictability over base rate.

Subject: The family who chose us, left, and came back

[Name],

Wanted to share a story.

About two years ago, a woman I'll call Karen was researching communities for her father, who had early-stage Parkinson's. She toured [Community] and two others. She liked us but chose the other community because their base rate was \$600 per month lower. I understood. That's a meaningful number.

Eight months later Karen called me. Her father's care needs had increased – he needed help with transfers and medication management – and the other community had reassessed him from Level 1 to Level 3. The monthly cost had jumped by \$2,200.

Nobody had explained the tier structure clearly at move-in. She was paying more than she would have paid at [Community], where the same services would have been a \$400 increase under our pricing model.

Here's the part that mattered most. It wasn't just the money. The reassessment had happened without a conversation. Karen found out from the invoice. Her father felt like he'd been reclassified, not cared for. The trust was gone.

She moved him to [Community] that spring. The transition was hard – moves always are – and I wished she hadn't had to make it twice. What I learned from Karen's experience is that the real cost of senior living isn't the base rate. It's the predictability. A family that knows what's coming – financially and emotionally – can plan. A family that gets surprised loses trust, and once trust is gone in this relationship, it's almost impossible to rebuild.

If you want to see what a real cost projection looks like – not a brochure, but a document that shows what happens as needs change – reply or call [number]. One more note and I'll leave you alone.

– [Name]

MESSAGE 4 OF 4 / SEND 5-7 DAYS LATER

Message 4: The Clean Close

Three options. The exit is graceful. The questions are theirs to use — with anyone.

Subject: Last note from me

[Name],

Last email unless you want to stay in touch. Three options:

If you want to visit: Reply or call [number]. We'll schedule a tour at your pace — not a sales event. Bring your parent if they're willing, or come alone first if that's more comfortable. We'll do a preliminary care assessment at no cost and give you a written cost projection covering the first three years based on your loved one's current and likely future needs. If [Community] isn't the right fit, we'll tell you that, too.

If you want to keep learning: [Community] publishes a monthly family resource — not marketing, but real guidance on topics like understanding long-term care insurance, applying for VA Aid & Attendance benefits, how to talk to a parent about the move, and what to look for in a care plan. [link] to subscribe.

If [Community] isn't the right community: Whoever you choose, five questions will protect your family: (1) Can I see a sample invoice at every care level, not just the one we're starting at? (2) How often are care levels reassessed, and who decides? (3) What is the community fee, and what portion is refundable if we leave within six months? (4) What has the average annual rate increase been over the past three years? (5) If my parent's needs exceed what this community provides, what happens — is there a memory care unit on-site, or will we need to move again? If a community hesitates on any of these, keep looking.

Either way, I hope your family finds the right place.

— [Name]

How to ship this

- **Replace the brackets.** [Community], [Name], [role], [number], [link] — every placeholder filled, nothing left in template form.
- **Pick a real community relations director as the sender.** Not a high-pressure intake coordinator. Use a real direct line and a reply-to that reaches them.
- **Render the body as plain text.** HTML email part, slightly large font (~16-17px), warmer-than-white background. Looks typed. Reads typed. People scan plain text differently.
- **Mind the cadence.** Message 1 within 4-24 hours of the visit. Message 2 three to four days later. Message 3 five to seven days after that. Message 4 five to seven days after that. Then stop.
- **Honor the promise.** If you said “last email,” it's the last email. Reactance kills the relationship faster than silence.