

# Case Study: Replacing Paper Workflows with a Centralized Resident Engagement Platform



Wellzesta

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## CATEGORIES

- ◆ Increased Resident Engagement and Satisfaction
- ◆ Increased Social Networks
- ◆ Increased Quality of Life
- ◆ Increased Staff Efficiencies
- ◆ Reduce Social Isolation
- ◆ Reduce Feelings of Loneliness

### Organization Name:

Sunnyside Communities  
(Harrisonburg, VA)

### Main Contributor:

Josh Lyons, President & CEO

### Organization Type:

Continuing Care Retirement Community (CCRC) / Life Plan Community (LPC)

### Organization Description:

Sunnyside Communities operates across three Life Plan Communities in Virginia, with the mission of “inspiring a spirit of community and well-being.” Sunnyside helps residents pursue a healthy, vibrant lifestyle through information, connection, and engagement in campus life.

## Project Description

Sunnyside adopted the Wellzesta Life engagement platform to create a centralized, trusted communication and wellness hub across three campuses. The move replaced paper-heavy workflows (printed calendars, posted menus, physical distribution) and a legacy resident platform that residents and staff had outgrown. The goal was simple: Make it easier for residents to stay informed and attend, while reducing duplicative staff work.

## Socialization Modality

- Social Network (resident groups)
- Event/Activity Sharing
- Text Chat / Messaging
- Digital Signage
- Photo Sharing
- Community App
- Activity Calendar
- In-app Reminders and Nudges

## System Embodiment

- Smartphone
- Tablet
- Desktop Computer
- Voice
- Smart TV / Digital signage

## Business Model

Private pay / standard of care (senior living resident engagement platform)

## Implementation Approach

Sunnyside treated the rollout as a community culture shift - not just another new app. The implementation plan was designed to create visible wins quickly at each campus, as well as an overall system.

- **Phased rollout:** Rolled out in stages to establish repeatable routines before expanding.
- **Training + champions:** Combined staff training with resident-facing education. Resident ambassadors created a more comfortable transition for tech-averse residents.
- **In-person enablement:** Leveraged in-person coaching sessions and ongoing education to support residents and meet them on a personalized level.
- **Feedback loops:** Captured feedback from residents, staff, and leadership during adoption to address community specific issues and improve consistency.

## Outcomes

### Increased Resident Engagement and Satisfaction

- Sunnyside reported strong adoption early in the rollout, with approximately **75% total active users** and an **85% average event attendance rate** as meaningful engagement metrics for routine participation.
- Leaders described a shift from “seeing a flyer” to “getting a nudge,” with real-time reminders increasing follow-through and attendance.
  - “We’ve noticed significant improvement in participation.” (Josh Lyons, President & CEO)

### Increased Social Networks / Reduced Isolation

- Resident groups and communication tools supported resident-to-resident coordination and connection.
- Staff observed more resident-to-resident conversation and “spillover” engagement around content that became conversation starters.
  - “The communication piece has been amazing. It’s made a huge difference.” (Robin Golliday, Director of Independent Living)

### Increased Quality of Life

- Residents gained a simpler way to stay informed and make plans, with timely reminders that helped reduce missed activities and last-minute confusion.
- Multi-channel access (mobile, desktop, and signage) supported different comfort levels with technology.
- Wellness content and goal-setting aligned with Sunnyside’s focus on well-being.

### Increased Staff Efficiencies

- **Targeted messaging** enabled faster, segmented communication to the right audiences without duplicating effort across channels.
- **Event registration** improved planning and room setup, while reducing paper sign-ups or missed communication within a prior platform.
- **To improve consistency**, communication previously spread across multiple tools and manual steps was consolidated into one system.

## Challenges and Pitfalls to Avoid

- **Adoption varies by care setting.** Assisted living and health care settings often require a slower pace, clearer routines, and education with family.
- **Ongoing support matters.** One-time training is not enough. Sustained reinforcement and champion models keep momentum.
- **Content governance is required.** Menu and dining segmentation (multiple venues, special meals, level-of-living visibility) needs a clear operational owner and staff training.

## Lessons Learned / Advice to Share

- **Drive a single source of truth.** Reduce parallel channels by making one platform the official source of resident-facing information.
- **Make simplicity the default.** Simple, repeatable routines drive weekly engagement better than feature tours.
- **Pair technology with human support.** Champions, resident ambassadors, and in-person enablement accelerate confidence.
- **Bring wellness to the forefront.** Let mission and vision be woven into consistent communication.
- **Use reminders to turn awareness into attendance.** Nudges help residents follow through.
- **Plan for continuous improvement.** Establish a feedback loop early so friction points get addressed before they become adoption blockers.