



SALES AND MARKETING ROUNDTABLE #263

Why Concierge Services are the New Senior Living Sales Strategy with Hersh Fernandes

Thank you to everyone who attended Sales and Marketing Roundtable #263!

NOTE: To provide anonymity during the Roundtable discussion, participants and their communities will not be identified.

ABOUT OUR GUEST

This week on Varsity's Roundtable, we were joined by Hersh Fernandes, CEO and co-founder of Dorvie, a concierge platform that's reimagining how everyday services are delivered to older adults.

Hersh shared how simplifying life for seniors isn't just good service, it's smart strategy. He explored how concierge offerings can reduce operational burden, enhance the resident experience, and create powerful new momentum for sales teams.



FRESH PERSPECTIVES

- **A CONCIERGE IS MORE THAN A SERVICE, IT'S A STRATEGIC ADVANTAGE** - Dorvie isn't just a convenience tool; it's a meaningful differentiator that supports sales, operations, and resident satisfaction. By streamlining life's logistics, it becomes a powerful asset in converting leads and improving the move-in experience.
- **EFFICIENCY IS BUILT THROUGH HUMAN CONNECTION** - Rather than a self-serve app or automated interface, Dorvie pairs members with real concierges. That human touch doesn't just feel better, it leads to smoother logistics, quicker issue resolution, and stronger engagement.
- **TECH + TRUST = SCALABLE CARE** - Dorvie blends technology with real human service to deliver scalable, trusted support. With a national vendor network and real-time dashboards, the model proves that you can maintain high standards even at scale.
- **STAFF AUGMENTATION THAT EMPOWERS, NOT REPLACES** - Dorvie doesn't replace in-house teams, it helps them. By taking non-core tasks off their plate, internal staff can focus on higher-value work without burning out or overextending themselves.
- **SERVICE FLEXIBILITY DOESN'T MEAN LACK OF STRUCTURE** - While Dorvie is flexible about which resident groups receive services, it's not an à la carte, opt-in model. This ensures cost-efficiency without sacrificing individual choice. Residents can still say "yes" or "no" to specific services offered.

LINKS & CONTACT INFO

Hersh Fernandes ([Linkedin](#))

Dorvie ([website](#))

hersh@dorvie.com

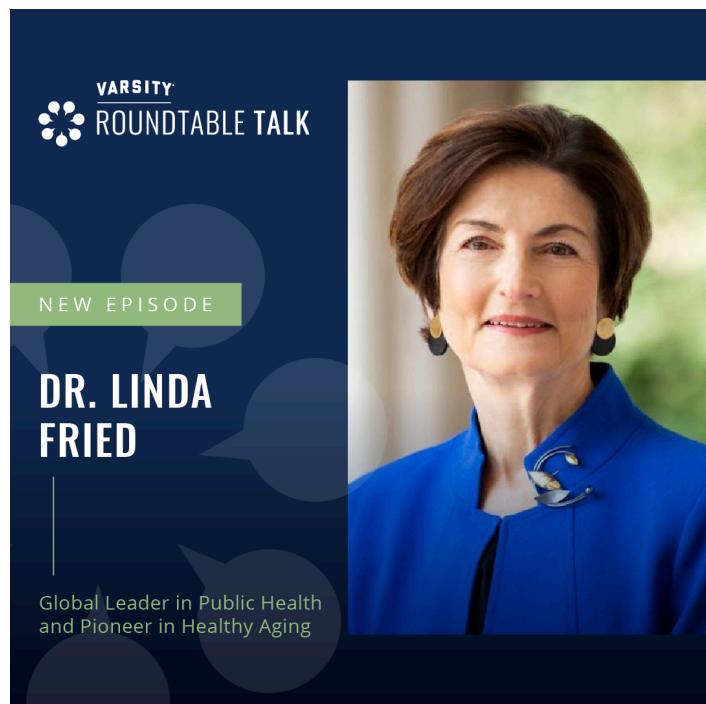
COMING UP ON VARSITY'S ROUNDTABLE!

Please join our next Roundtable gathering on Thursday, July 3 at 12 p.m. ET, 11 a.m. CT and 9 a.m. PT. We will be joined by Andy Edeburn, Managing Partner of Elder Dynamics. Andy will share his perspectives on the senior living sector.

THE NEWEST EPISODE OF VARSITY'S PODCAST

Varsity's podcast, [Roundtable Talk](#), is about longevity and aging. Each episode features a discussion with an industry expert about how to solve the many mature market challenges facing brands today.

The most recent episode features a conversation with Dr. Linda Fried, a world-renowned geriatrician, public health expert, and Dean of Columbia University's Mailman School of Public Health. A pioneer in the science of healthy aging and frailty, Dr. Fried has dedicated her career to understanding how we can build systems and communities that support longer, healthier, and more purposeful lives.





A NEW ERA FOR SALES & SERVICE IN AGING SERVICES THROUGH CONCIERGE-FULFILLED SERVICES

Hersh Fernandes is the CEO and co-founder of Dorvie, a service platform designed to help older adults age in place with ease, comfort, and dignity. Hersh brings a forward-thinking approach to solving one of aging's biggest challenges: coordinating reliable, everyday services for seniors. His work focuses on using technology and human-centered design to simplify life for older adults and their families, turning what can often be a fragmented experience into a seamless, concierge-supported model.

Dorvie offers a nationwide network of fully vetted vendors, paired with personalized concierge teams who manage everything from scheduling to billing. Whether it's arranging transportation, home maintenance, grooming services, or unexpected tasks (like removing a rogue squirrel), Dorvie ensures that seniors receive the services they need, when and where they need them.

What We've Learned Works: Complete Service Ownership

Dorvie does for services what Amazon did for products: end-to-end fulfillment

A Concierge for Every Member

Members are assigned a human concierge who they can call, text, email, or contact online as needs arise

Problems Solved and Time Saved

Concierges find, book, and bill services (beyond referrals), so members get what they need and can focus on what matters

Vertical Integration

Dorvie coordinates national networks of 3rd party vendors who deliver all services

Dorvie is like Amazon, but for services instead of products. You know how you can toss shoes, a blender and a backpack into one Amazon cart, check out once and everything just magically shows up? That's the kind of experience Dorvie is trying to recreate, but for tasks like house cleaning, pet sitting or finding a handyman.

Instead of hunting for vendors on Yelp and coordinating all the logistics yourself, Dorvie gives each member a personal concierge. This real human (not a bot!) can be texted, called or emailed any time you need help with... pretty much anything. They'll find a pre-vetted, insured, background-checked service provider and handle all the scheduling and billing. No juggling five phone numbers or keeping track of multiple invoices.

Even better, Dorvie has a nationwide network of service providers. And if they don't already have someone in your area, their vendor team will go find one. The whole goal is to make service coordination as simple and seamless as online shopping.

Partnering with Aging Services Providers

Dorvie plays a role across our partners' continuums of care and beyond

WHO WE PARTNER WITH:

→ **CCRCs Continuum-Wide**

Amplify resident experiences through diversified services

→ **CCaH Programs**

Force-multiply staff time by outsourcing non-care tasks

→ **Employers of all Kinds**

Give every employee a concierge to manage "life" in work-life balance



Dorvie has successfully managed its service model across three key partner types: on-campus aging communities like CCRCs, at-home programs like continuing care at home, and even through employers offering Dorvie as a benefit to their employees. While most of the business focuses on aging services, the employer side branches out beyond that—companies like Netflix and the New Jersey Teachers Union have adopted it to help employees manage life's logistical hassles.

The big insight? Replacing a self-serve website with a real human concierge makes all the difference. That person becomes the go-to for everything from services already available on campus to entirely new ones people hadn't even considered. It's about creating one seamless, stress-free point of contact for all kinds of life needs.

Concierge-Fulfilled Services Unlock Strategic Outcomes

Campus operations face rising expectations that require rethought service models



Concierge-fulfilled services aren't just an amenity—they're a scalable response to rising complexity.

With tight budgets being a constant concern, Dorvie's concierge model actually helps create efficiency by serving as the central hub for all service requests. Hersh outlined how this approach supports partners in three main areas:

1. SALES AND MARKETING - Concierge services act as a unique selling point—a fresh hook that gets prospective residents onto campus for tours. Dorvie has data showing this strategy works. It also helps make the move-in process smoother and more hands-off for future residents, reducing their stress and workload during an already overwhelming time.

2. RESIDENT EXPERIENCE - Once residents are on campus, the concierge unlocks new amenities and services that enhance daily life. At the same time, it lightens the load for internal teams by handling requests that might otherwise fall on them like pet care, shopping, or other personal tasks.

3. FACILITIES AND OPERATIONS - The concierge system allows internal maintenance and facilities staff to focus on what truly needs to be done in-house, while easily outsourcing other service requests. It's about making sure that not everything lands on the same already-stretched team.

Personalized concierge services give you another answer the question:

HOW WILL THE COMMUNITY MAKE MY LIFE EASIER?

Give
Prospects

a new reason to visit and
stay engaged

Support
Future Residents

before they can
move on campus

Manage
Move-Ins

handling all the
toughest aspects

Hersh explained how Dorvie's concierge model boosts sales and marketing for partner communities by giving prospects a compelling reason to engage, like getting a personal concierge when they join a waitlist or sign a contract. When promoted through mailers, it often leads to more tours and waitlist sign-ups.

It also helps future residents experience the ease of campus living before they move in, with the concierge managing tasks like downsizing, packing, and scheduling. This reduces stress and makes the transition smoother and more appealing.

Personalized concierge services give you another answer the question:

HOW CAN MY STAFF SAY “YES” MORE OFTEN?

Diversify amenities

on campus

to include residents’ “non-core” requests

Offer freedom

to get more

without changing staffing models

Bring engagement

software to life

even for those who don’t use the tech

Hersh outlined three key ways Dorvie supports residents already living on campus:

1. **FULFILLING NON-CORE REQUESTS** - Residents often need services that aren’t typically offered—like a Costco haul or a mobile oil change. Instead of putting staff in the awkward spot of saying no (or figuring it out themselves), Dorvie’s concierge can step in to handle these unusual asks.
2. **SUPPLEMENTING EXISTING SERVICES** - Some residents want more than the standard—like extra house cleanings beyond what campus staff can reasonably provide. Dorvie brings in vetted third-party vendors to meet these additional needs without overburdening internal teams.
3. **ENHANCING RESIDENT ENGAGEMENT SOFTWARE** - Many communities invest in engagement platforms, but some residents don’t log in or use them. Dorvie acts as a friendly, accessible layer on top, letting residents text, call or email a concierge instead, so they can still get support, make requests and stay connected in a way that feels natural.

Personalized concierge services give you another answer the question:

HOW CAN I ADD CAPACITY WITHOUT MORE BUDGET?

Allow
Facilities to focus

on priority tasks and
offload the rest

Bring in
new expertise

for maintenance &
repairs only when needed

Rebalance
evolving workloads

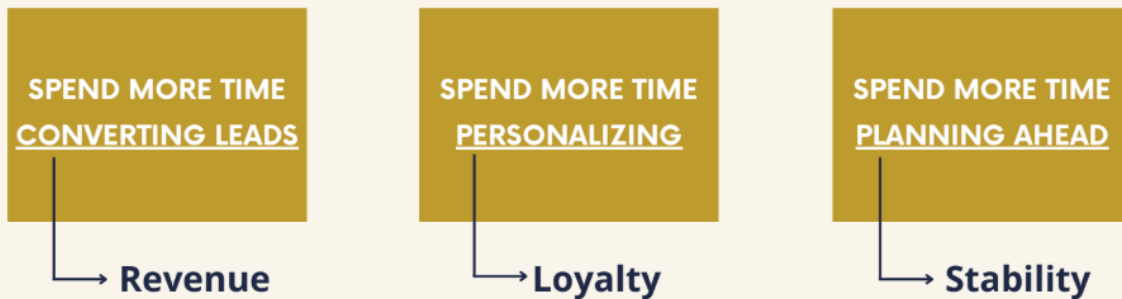
to prevent
backlog and burnout

Hersh emphasized how Dorvie's concierge model brings real value to facilities, operations, and maintenance teams by helping them manage their already full plates. By outsourcing non-resident-facing tasks to third-party vendors, these teams can focus on core responsibilities while Dorvie coordinates the rest.

This approach also lets communities tap into specialized skills like carpentry or cabinet installation only when they're needed, especially during unit turnovers. It removes the pressure to build or maintain those capabilities in-house and creates a more flexible, responsive way to balance team needs over time.

Why Capacity is Your Competitive Advantage

Time saved isn't time banked, it's time reallocated to resident satisfaction



Wrapping up, Hersh explained that Dorvie aims to enhance both the resident experience and internal staff operations. The concierge model helps communities convert more leads, support future residents through their transition, and personalize the journey at every stage of the sales funnel. At the same time, it acts as staff augmentation, relieving teams of daily logistical burdens so they can operate more strategically. It's all about driving revenue, boosting loyalty, and building long-term stability.

QUESTIONS

DOES DORVIE ASSUME LIABILITY IF SOMETHING GOES WRONG WITH A SERVICE PROVIDER IN A CLIENT'S HOME?

Dorvie does take on both the liability and the responsibility for ensuring services go smoothly. If something goes wrong—whether it's a safety issue or just a less-than-great experience—the concierge stays in close contact with the member and can address it in real time. Over nearly four years and thousands of services delivered, Dorvie has maintained a 99.5% satisfaction rate.

DO YOU WORK WITH THE USUAL DOWNSIZING AND MOVING SERVICE PROVIDERS THAT COMMUNITIES ALREADY PARTNER WITH, LIKE MOVING STATION? AND IN CASES WHERE A COMMUNITY OFFERS SOMETHING LIKE A \$2,500 DOWNSIZING CREDIT, HOW DOES DORVIE FIT INTO THAT SETUP? ALSO, COULD YOU SHARE WHAT THE TYPICAL FEES ARE PER RESIDENT SO PEOPLE CAN BETTER UNDERSTAND THE COST STRUCTURE?

Yes, Dorvie does work with established downsizing and moving service providers like Moving Station when partnering with communities. As for pricing, the starting rate is \$2 per member per month, whether that's a resident, future resident, employee, or CCA member. That's the maximum, and the cost can decrease based on factors like volume, multi-year commitments, or upfront payments. So there's flexibility to bring that rate down depending on the partnership structure.

IS THE \$2 PER EMPLOYEE OR RESIDENT PER MONTH JUST A BASELINE FEE, WITH ADDITIONAL CHARGES APPLIED ON A PER-PROJECT OR PER-HOUR BASIS?

Yes, the \$2 per member per month is just the baseline fee. For individual services, Dorvie passes along the exact cost provided by the vendor—there are no markups. The end user, whether it's a resident, future resident, or staff member, has full control over whether to accept that price. If they want multiple estimates, Dorvie can provide those. Plus, with years of data and thousands of service interactions, Dorvie can offer an informed gut check if a quote seems unusually high or low.

WHAT METRICS OR REPORTING DOES DORVIE PROVIDE TO COMMUNITIES? CAN COMMUNITIES SEE HOW MANY RESIDENTS ARE USING THE SERVICE AND WHAT TYPES OF SERVICES ARE BEING REQUESTED?

Yes, Dorvie provides each partner with a real-time data dashboard. It includes core metrics like how many residents are using the service, what types of services they're requesting, and how much they're spending. It also tracks time saved for both the residents and the staff by using Dorvie instead of handling things independently. The dashboard is customizable, so if a community needs additional metrics, those can be added as well.

DO SENIOR LIVING COMMUNITIES TYPICALLY PASS THE COST OF CONCIERGE SERVICES DIRECTLY TO RESIDENTS, OR DO SOME COVER PART OR ALL OF THE COST UP TO A CERTAIN LIMIT?

Hersh explained that it really depends on the community, but there are a few common patterns. During the move-in process, many communities will cover a certain number of hours or specific services to help residents get settled.

For non-core or additional requests—like mounting a TV or assembling furniture—those costs are usually passed along to the resident, either through the community's billing system or as a direct bill from Dorvie. In some cases, like emergency plumbing after hours, the charge may go directly to the community. Dorvie's system is flexible, making it easy for communities to handle billing however they choose.

CAN RESIDENTS OPT IN OR OUT OF THE CONCIERGE SERVICE INDIVIDUALLY, AND IS IT FLEXIBLE ENOUGH FOR THEM TO JOIN AT ANY TIME RATHER THAN BEING ALL-OR-NOTHING FOR THE WHOLE COMMUNITY?

Hersh explained that Dorvie doesn't typically allow individual opt-in or opt-out at the resident level because the \$2 per person rate is based on spreading usage across a larger group. However, communities do have control over which groups receive the service. For example, they can choose to offer it only to future residents, a specific subset of residents, or just employees. So while it's not a per-person opt-in model, it is flexible in defining who the service applies to.

DO RESIDENTS KNOW THEY'RE INTERACTING WITH DORVIE, OR IS THE SERVICE WHITE-LABELED TO APPEAR AS PART OF THE COMMUNITY? HOW DO RESIDENTS ACCESS THE SERVICE—THROUGH A PHONE NUMBER, ONLINE PORTAL, OR SOMETHING ELSE—AND WHAT DOES THAT EXPERIENCE LOOK LIKE FROM THEIR PERSPECTIVE?

Hersh shared that Dorvie initially tried a fully white-labeled experience, but it turned out to be a mistake for a few key reasons. First, it created too much context switching for their concierge team. Second, some residents discovered Dorvie's name in the fine print—like the terms of service—and got confused about who they were really interacting with. Third, residents occasionally assumed the concierge was sitting alongside community staff and would ask them to pass along messages, which led to awkward situations.

As a result, Dorvie shifted away from white labeling. Now, they make it clear—at least somewhere in the fine print—that residents are contacting a third-party service called Dorvie.

ARE THERE OTHER CONCIERGE SERVICE PROVIDERS LIKE DORVIE OUT THERE?

Hersh explained that Dorvie hasn't found another provider offering the same kind of dedicated, human concierge experience—especially one tailored to aging services or employee benefits. While some companies may use similar language or offer parts of what Dorvie does, none deliver the full model.