LeadingAge Illinois

AI Applications

With Essential Ethical Considerations
for Sales, Marketing, and Beyond



Change Makers
2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

2026 Annual Conference

July 14-15, 2026 Schaumburg, IL

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

What We'll Cover



> Use AI to Supercharge your Strategy - Not Replace It

- Introduction
- What is AI?
- Limitations and Ethics
- Legal Issues in AI
- AI Positives
- AI Strategy
- Our Case Studies
  - AI in Marketing
  - AI in Sales
  - AI in Training
- The Future of AI
  - How do we adapt?
- Questions?

LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

What is AI?

LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

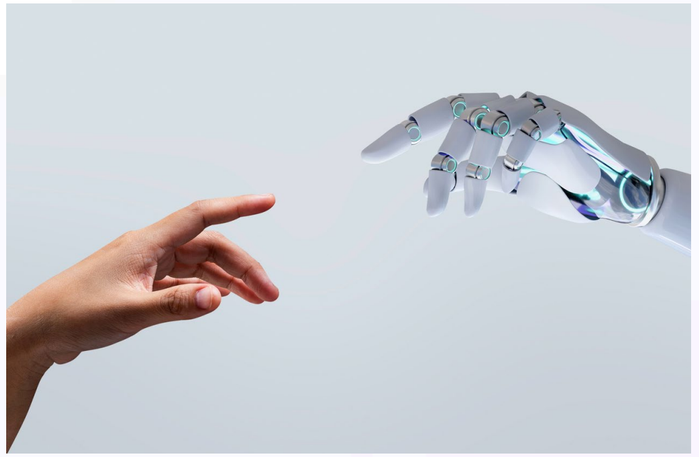
What is AI?

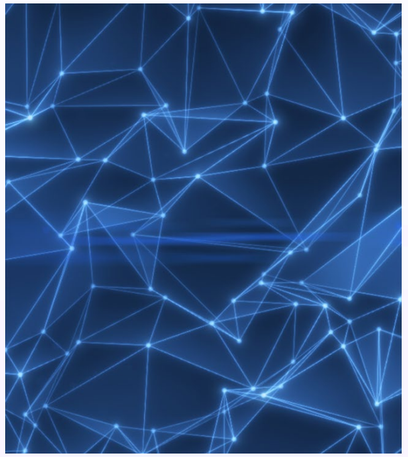
The Real Question Is: What Is It Not?

- Not a replacement for critical thinking
- Not a replacement for a strategist

Think of AI as a “supercharger” for your team

- Acts as a tool to help make your team more efficient
- A Harvard study has shown that human and AI collaboration boosts productivity
  - Participants completed 12.2% more tasks on average, and completed tasks 25.1% more quickly and produced higher quality results





LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE



What is AI in Summary?

It's a prediction model
that can help your team

And Why Should We Use It?

If you don't, others will, and you'll fall behind

- Chat GPT has 800 million weekly active users
- 67% of organizations globally use generative AI to support operations
- 52% of U.S. adults now use LLMs, with 77% of adults aged 18–29 reporting active use.

LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Limitations and Ethics

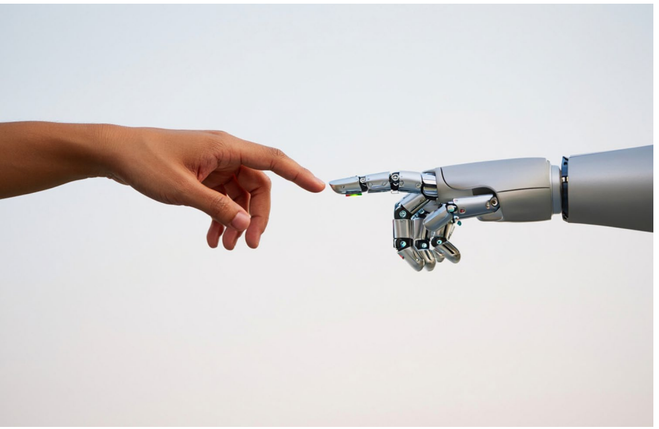
LeadingAge Illinois

Change Makers
2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Limitations in AI

AI has several important limitations to keep in mind. Bias can color what you create, and AI is only as good as the data that it's trained with. Not only that, but you need to be aware of inaccuracies, as so AI needs to be guided by someone who is knowledgeable in the field and can "call" AI on inaccuracies.

Lack of Human Empathy



Inaccuracies



The "Creepy" Factor



Bias



LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Limitations and Ethics

AI is a powerful tool, but we have to keep its limitations and ethics in mind. Pictures that don't accurately portray amenities, or not respecting privacy of individuals is a sure fire way to get in trouble. In addition it's important to remember that bias can be inherent in AI.

By 2025, Artificial Intelligence is predicted to generate 90% of online content.

Case Study 01

Dove's "Real Beauty" campaign shows the inherent bias in AI-generated ads.

Case Study 02

Amazon's Recruiting AI was scrapped in 2018 due to downgrading resumes with "woman" in them

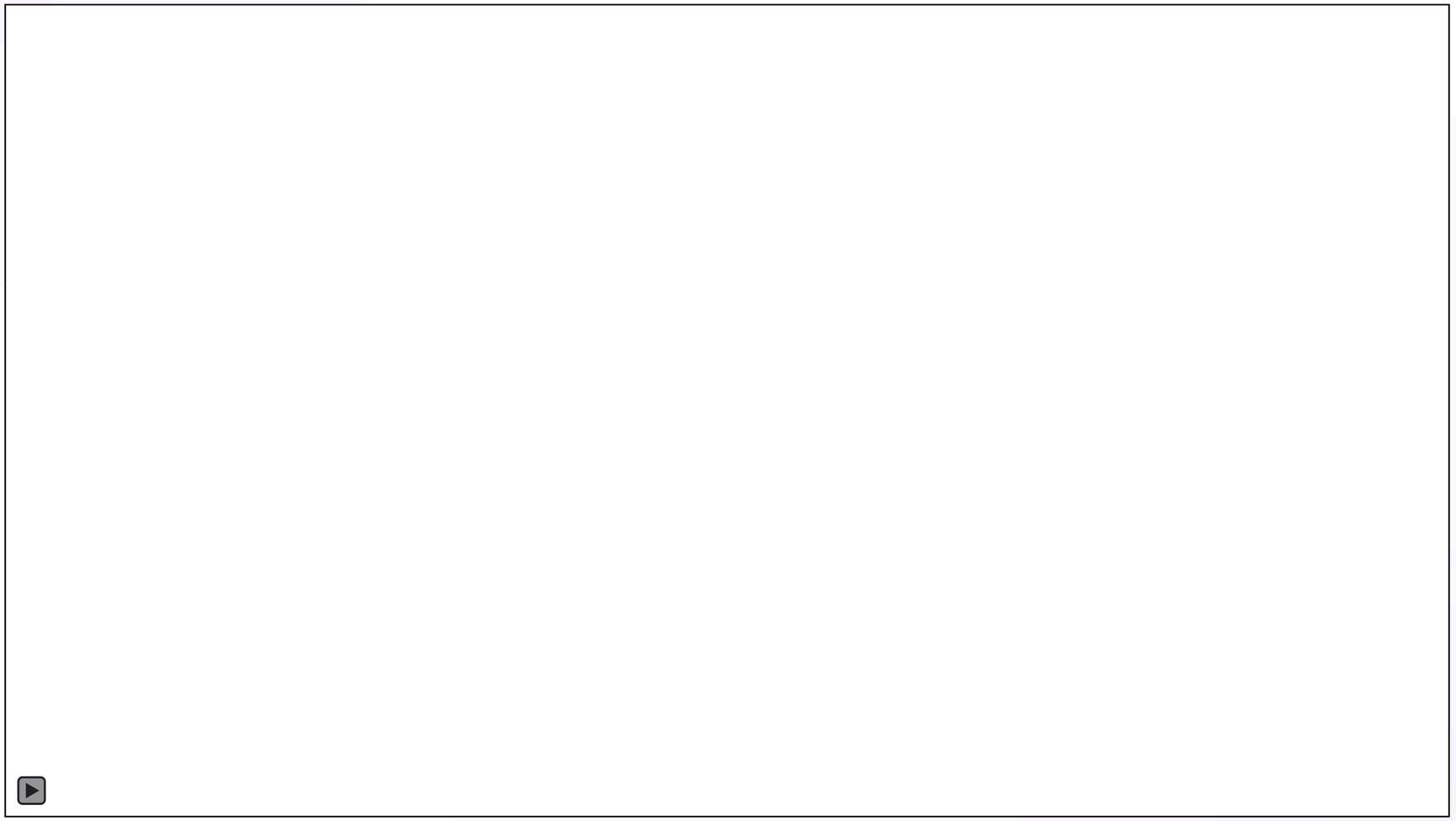


LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

How Dove Pointed Out AI Bias

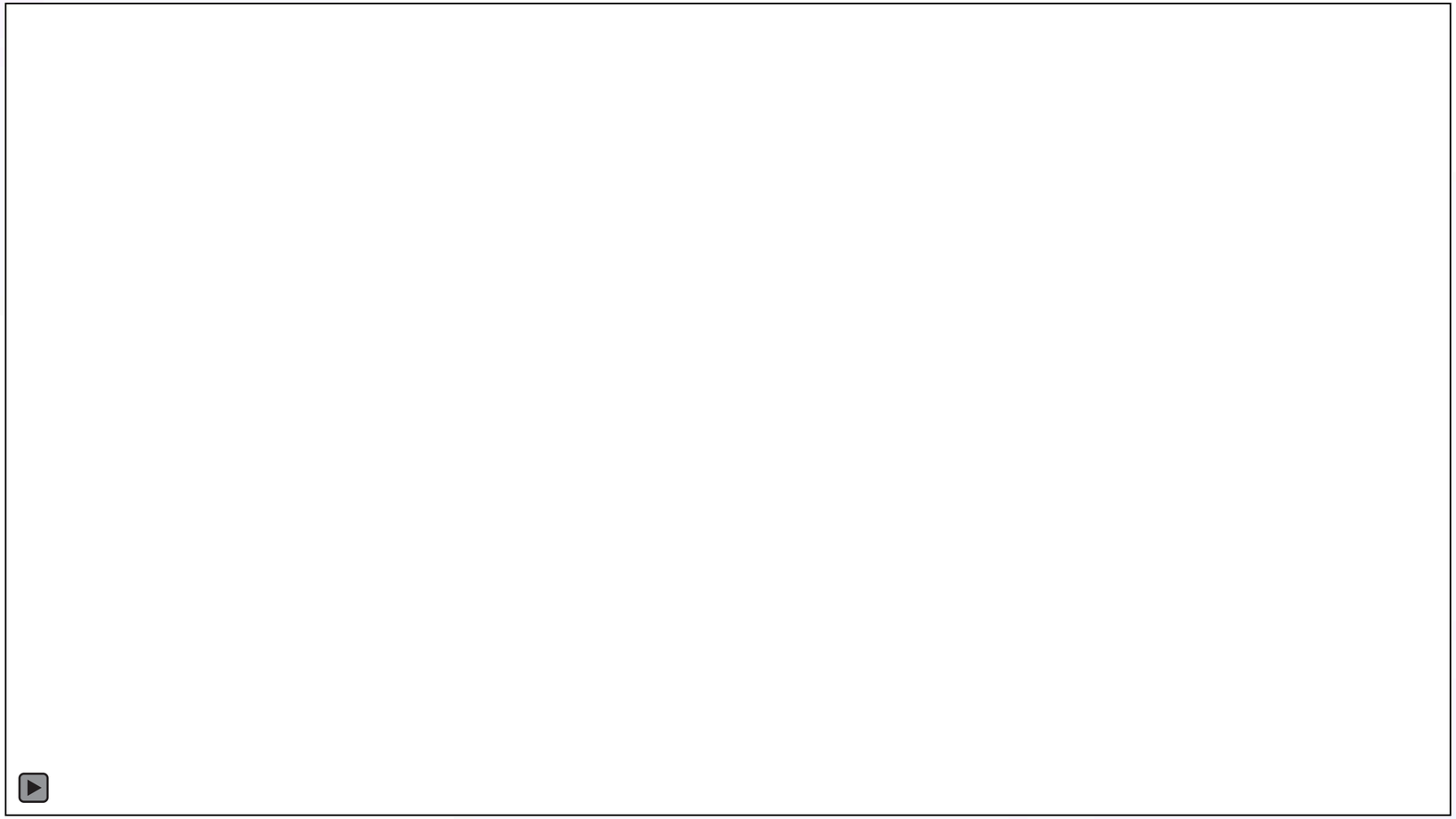


LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Amazon’s Recruiting AI: Bias in Training



LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE



AI Ethical Framework

What should you consider when creating an ethics framework for your organization?

- Privacy
- Accountability
- Safety and Security
- Fairness and Non-Descrimination
- Human Control
- Professional Responsibility (infusing ethical concerns throughout the process and organization)
- Promotion of Human Values

You don't need all of them as your principles, but ask yourself: Do these make sense for my organization?

LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Legal Issues in AI

LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Legal Issues in AI

There are several legal issues to be aware of in the senior living industry, including bias in AI models, privacy concerns when employees enter information, copyright in AI, and also misleading content that can be created with generative models.

Bias



Privacy



Copyright



Consumer Protection



LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Positives of AI

LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Now to the Positives

We've gone over the pitfalls and limitations of AI, so now it's time to look at the positives:

- AI can be your team's best "partner" to improve their work.
- When used judiciously, AI can save your both time and money.

We'll be going over strategy, and our practical case studies.



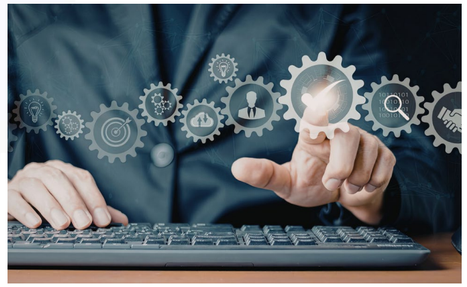
LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

AI Strategy

Don’t Be Like the Others. Use AI Strategically. Ask These Questions









What Can Be Automated?

What things are your team members doing over and over

What Can Be Improved?

What things do your team struggle with and can AI help

What are Your Savings?

Audit which tools can save you the most in time, resources, and money.

What Must be Protected?

What risks, compliance needs, and brand standards must remain safeguarded as AI is adopted?

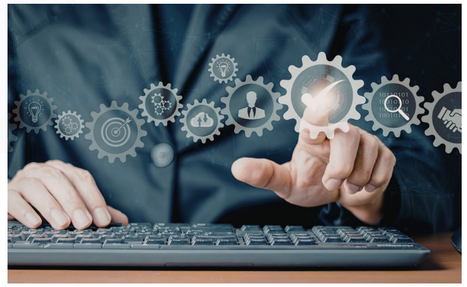
LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

AI Strategy

What Covenant Living Has Done:









What Can Be Automated?

- Note Taking
- Google Ads Captions

What Can Be Improved?

- Call Availability
- Follow Up

What are Your Savings?

- 1,362 more qualified leads in PPC with no added cost
- Team members using AI are increasing customer satisfaction

What Must be Protected?

- Covenant Living Branding
- Resident Information

LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

AI Case Studies

LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Our Case Studies

As a team, we've implemented AI across our various communities to great effect. Here are just a few of our own case studies, and how they may benefit you. With AI, we:

- Increased lead generation and reduced cost per lead
- Improved team efficiency and increased strategic time



LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

AI in Marketing

AI is transforming our tactics for digital marketing. With the rise of “zero click” search, conversational content is more important than ever. However, AI is also supercharging our efforts. Performance Max and other tactics are extending our reach and giving our team the tools they need in order to succeed.



Case Study

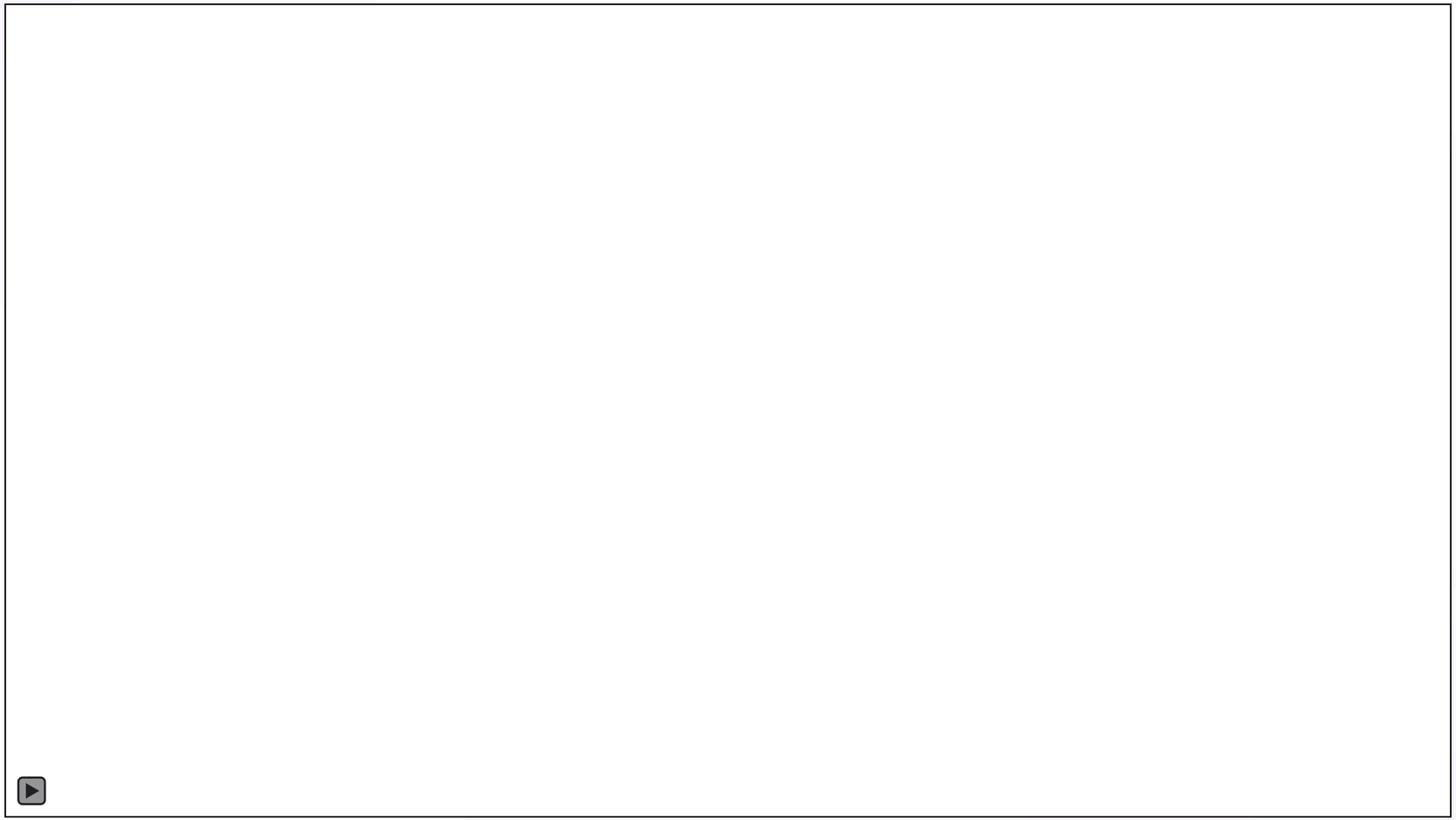
After switching over to Performance Max, we saw a major increase in leads and results

LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

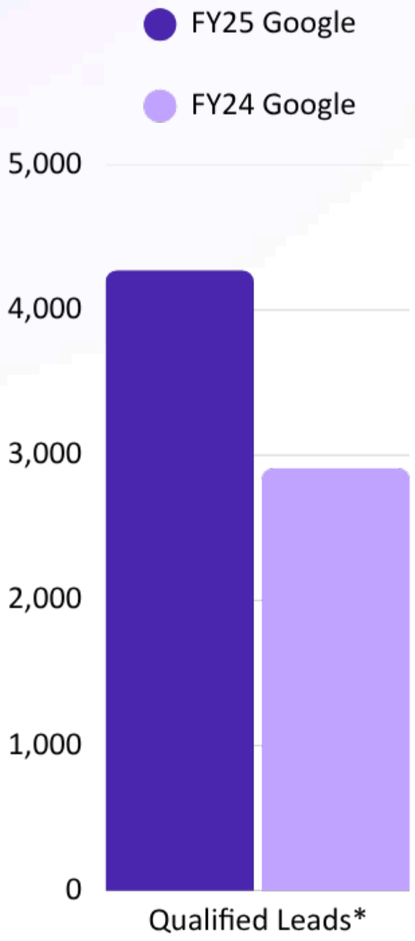
What is Performance Max?

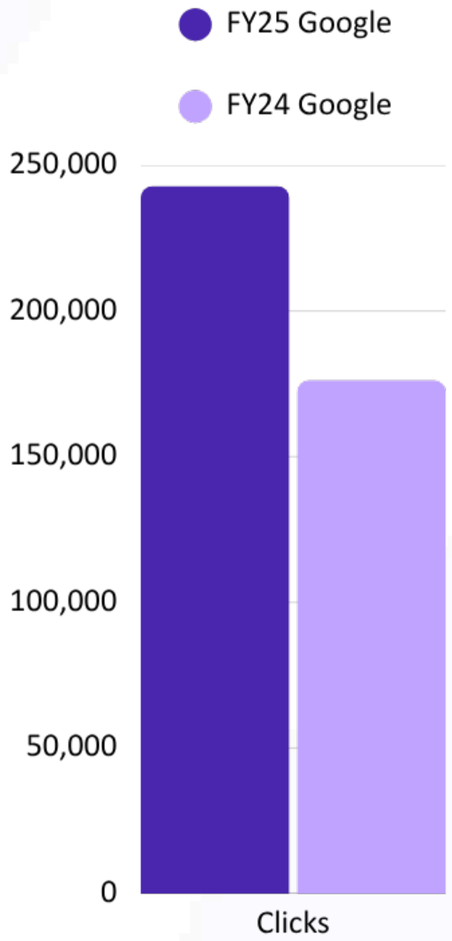


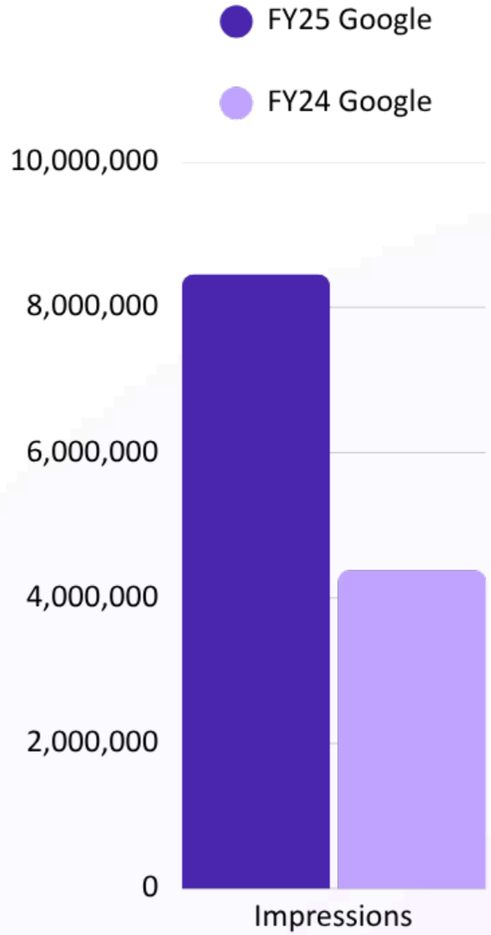
LeadingAge Illinois

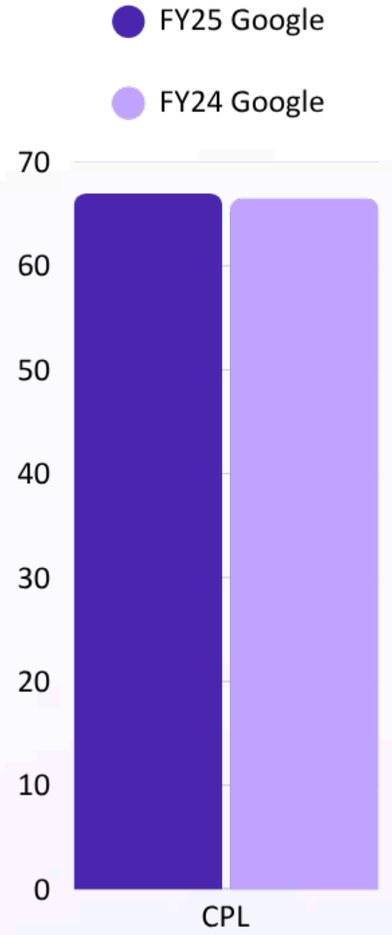
Change Makers
2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Google PPC Performance with MAX









LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

AI in Sales

Senior living sales is evolving. Today's prospects expect timely, personalized communication, while sales teams are managing longer decision cycles, multiple stakeholders, and increasing demands on their time.

AI has the potential to support sales team. This isn't done by replacing the human connection that drives decisions, but by enhancing it.

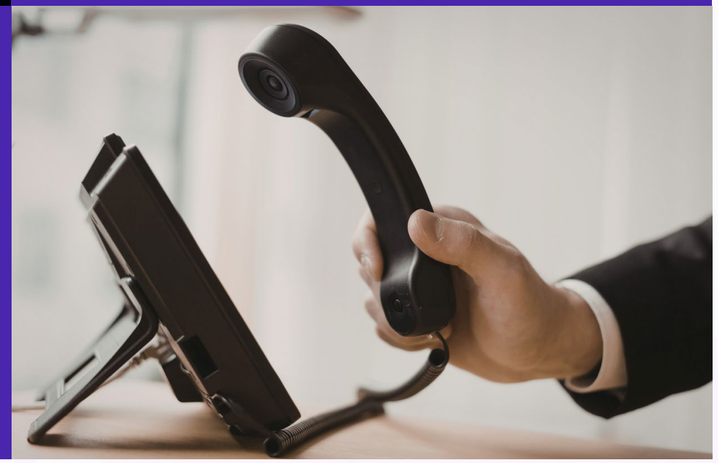


Case Study 01

Speed to Lead: AI helps your sales team respond faster to every new lead

Case Study 02

Virtual Assistant: AI can help or even manage redundant sales tasks



LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Speed to Lead

In senior living, the first response often sets the tone for the entire relationship. Prospects and their families are frequently reaching out during moments of urgency or uncertainty, and delays can result in missed opportunities or lost trust. Speed to lead is no longer just a competitive advantage. Instead, it's an expectation. This is where AI can play a critical role.





- **AI Enables Speed** The first response is the most important moment. AI enables immediately and thoughtful responses.
- **Full Coverage** AI assists with after-hours or weekend coverage, or when the Sales Team is focused on in-person meetings and live events.
- **AI speed to lead is more than just chat:**
  - Guide AI chat
  - Smarter forms and surveys
  - Engaging auto attendant
- **AI reduces missed calls** Sales agents are human, but AI can be there to reduce missed calls, hang-ups, and voice mail.
- **AI provides more information to the team** AI can integrate with your CRM to help provide relevant information about a prospect, giving your sales team an "edge" for in-person interactinos.

AI is meant to support your Sales Team, not replace it.

Both Your Own Experience and The Data Show:
Faster Response = More Tours = More Move Ins

LeadingAge Illinois

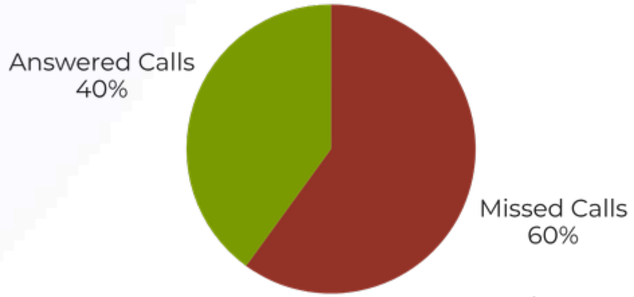
Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

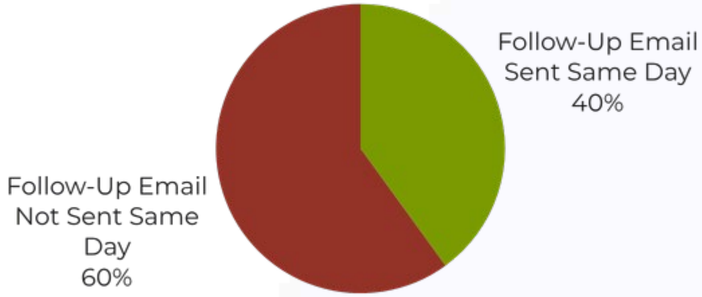
AI has the potential to supercharge your sales team, allowing them to respond quickly and efficiently to inquiries. It also allows them to use AI so that they do not need to be “on call” 24/7 and can instead rely on AI to do an initial reach-out during off hours.

Result: Marked Follow-Up Improvement among sales with AI

Before AI

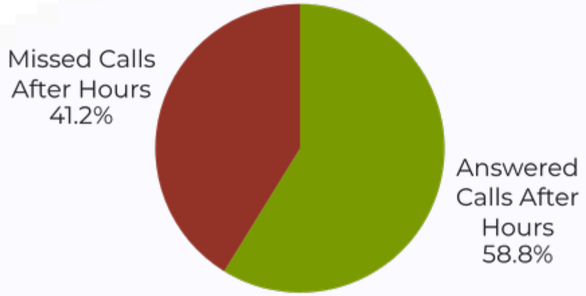


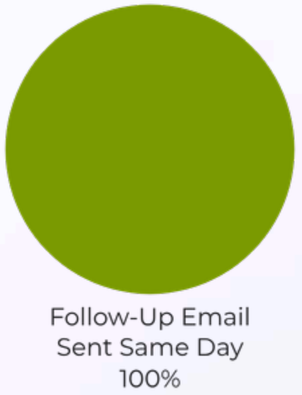




After AI







LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Virtual Assistance

From the first inquiry to the final decision, the senior living journey is built on trust, timing, and consistent communication. Yet behind the scenes, sales teams are often balancing follow-ups, scheduling, CRM updates, and ongoing nurture—tasks that take time away from what matters most: building relationships. This is where AI can play a transformative role. Not as a replacement for the salesperson, but as a highly capable personal assistant.





- **First Response** - AI enables fast, personalized responses that improve first impressions and engagement.
- **Inquiry** - AI helps organize and summarize new leads so sales teams can respond with clarity and context.
- **Nurture & Follow-Up** - AI ensures consistent, ongoing communication so no lead is forgotten or overlooked.
- **Scheduling & Rescheduling** - AI simplifies scheduling and logistics, reducing delays and increasing efficiency.
- **Tour Support** - AI prepares sales teams with insights before tours and supports timely, relevant follow-up after.
- **Tour to Deposit** - AI maintains momentum after the tour through structured, personalized follow-up.

Salesperson-focused AI can support the entire journey from inquiry to move-in by helping sales teams focus on meaningful interactions.

LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Some Quick Stats

Not sure about using AI for your sales team? Here are some hard percentages for you to consider.

Before AI

Sales reps spent only 30 - 35% of their time actually selling

After AI

Sales reps focused 45 to 60% of their time actually selling

Follow-Up Consistency

Teams Using AI report higher consistency in follow-up messaging

44% of sales reps give up after just a few follow-ups

Focusing on the Customer

81 % of sales teams say AI helps them reduce manual tasks

74% say AI allows them to focus more on the customer

Increase in Leads

Companies using AI in sales see up to 30-50 % increase in leads and appointments.

Automated reminders can reduce no-shows by up to 30%

Better Conversions

Faster response times combined with consisten nurturing and engagement can increase conversions by up to 250+%

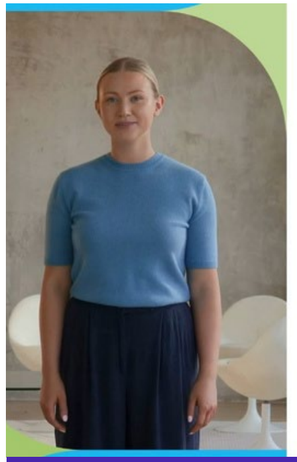
LeadingAge Illinois

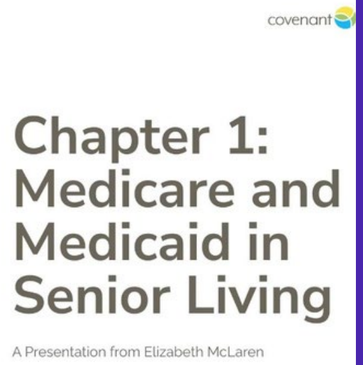
Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

AI in Training and Team Efficiency

One of the things AI is great at doing is saving our team members time. By using Co-Pilot, Synthesia, and other platforms, we've given our team the tools to work faster, save time, and also "supercharge" their efforts.



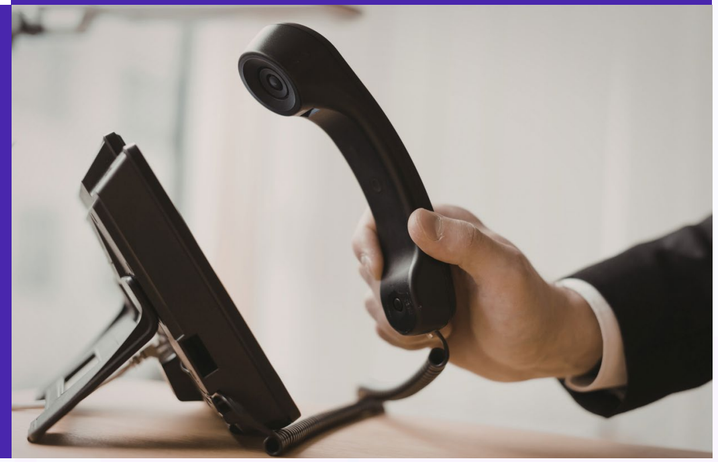


Case Study 01

Synthesia has been a game changer for our organization to help with both training and reporting to our clients.

Case Study 02

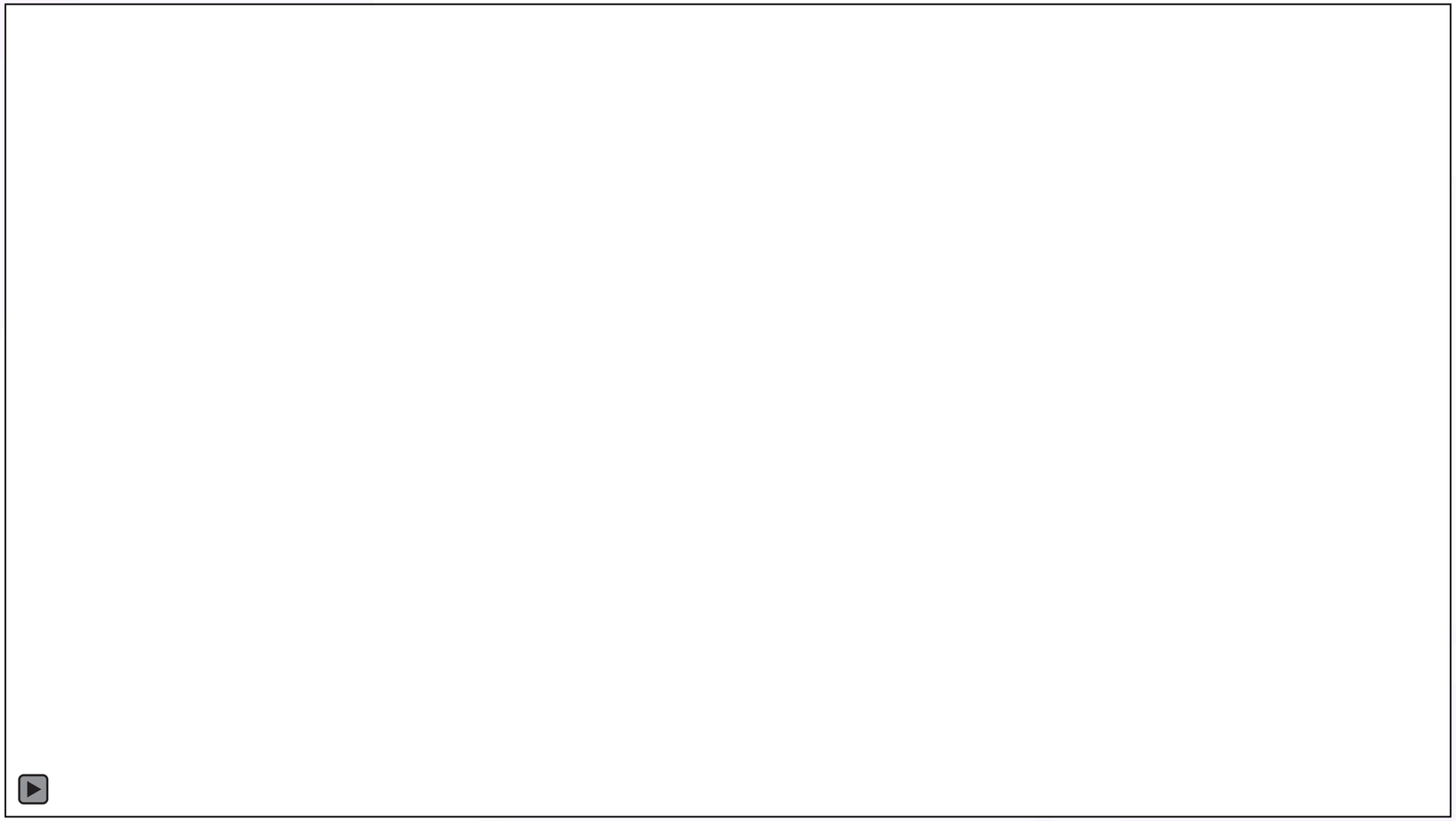
We found our team was spending 15 - 25 minutes after every meeting revising notes. Co-Pilot has helped their efficiency.



LeadingAge Illinois

Change Makers

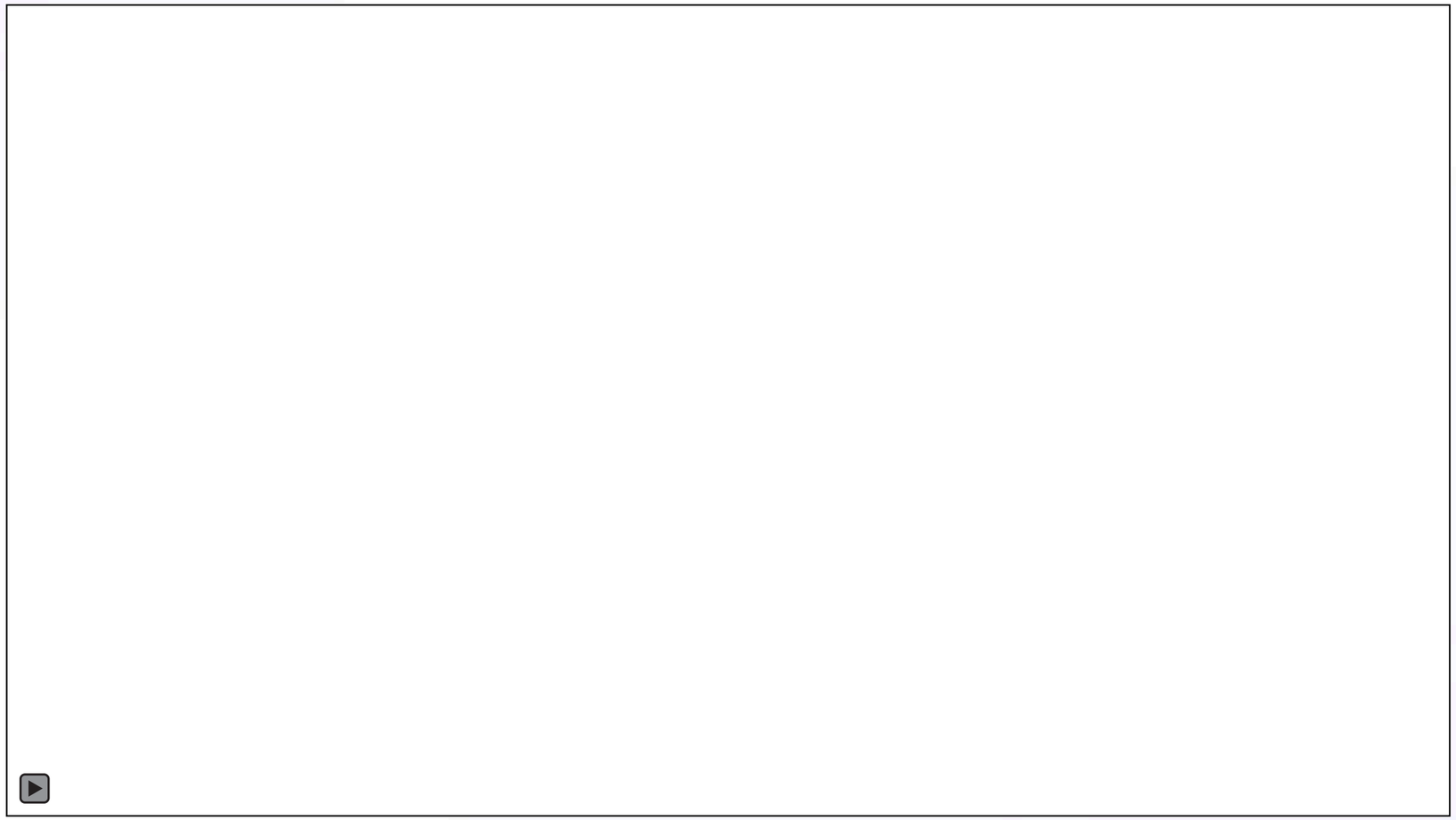
2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE



LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE



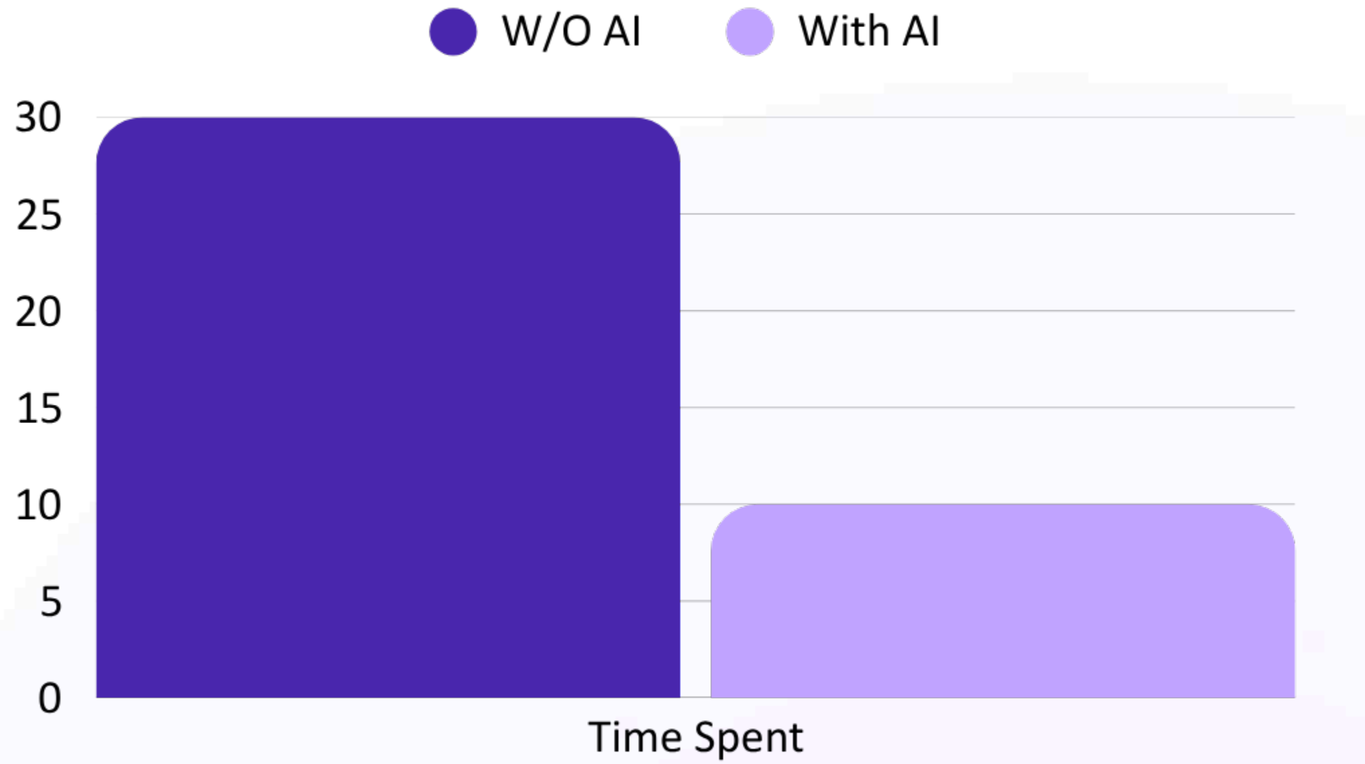
LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Co-Pilot

We realized that our team members were spending a lot of time recording, writing up, and then sending out notes to our clients after meetings. After using Co-Pilot, our team has halved the time they spend on this process. This had lead to greater efficiency and more timeliness with client reach-out, which has, in turn, lead to greater client satisfaction.



LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

The Future of AI

LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE



The Future Impact of AI

- The disappearance of "PPC" and the arrival of "zero click" visibility
  - New age for content marketing
- Agentic AI and Autonomous Workflow
  - Marketers will guide AI agents, who will complete the assigned tasks
- "First touch" becomes AI
  - Conversational AI agents will take the place of human ones

LeadingAge Illinois

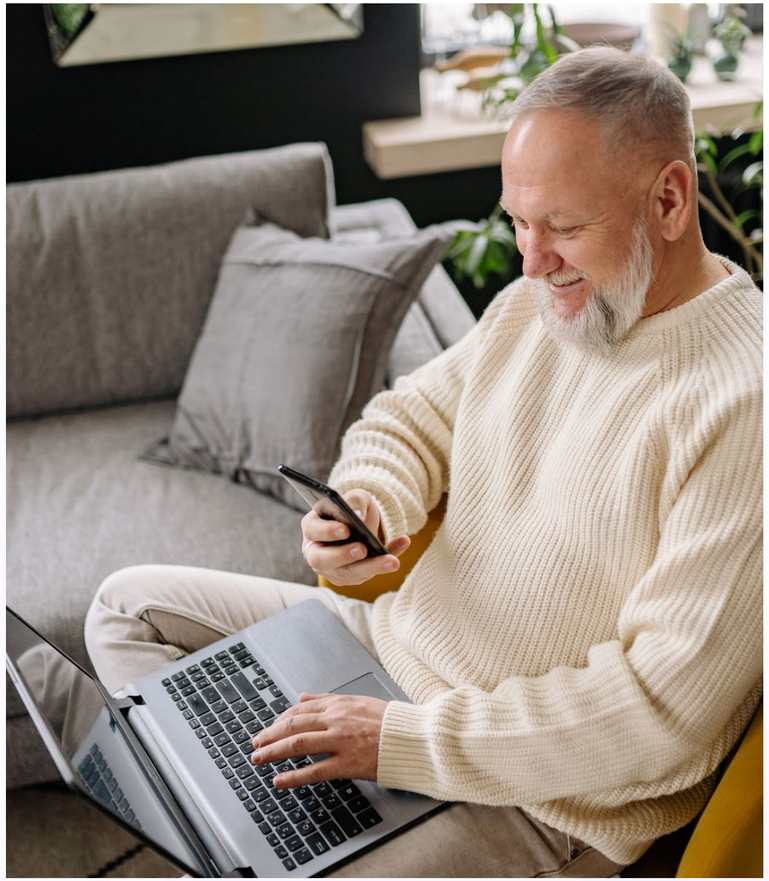
Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

How Do We Adapt to AI?

We mentioned some trends, but how do we adapt?

- Start altering your website for AI-powered search
- Embrace a new era of content strategy - on your website and elsewhere online
- Make sure to have safeguards in place for AI content



LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

AI-Powered Search

Families are more likely to use ChatGPT or Gemini rather than traditional search methods, asking things such as “What is a good memory care community in Iowa that is under $6k per month?”









Be Conversational and Include Answers

Include conversational and question-based language on your website

Include More Information

Mention specific care capabilities and anything people may ask, or AI-powered search may not pick up on yoru website.

Pricing Tactics are Changing

Be transparent about pricing structures rather than obfuscating them. One of the first questions prospects ask is about pricing

Be Very Detailed

Include detailed information about your various amenities and other facets of your organization.

LeadingAge Illinois

Change Makers
2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Reputation, Reputation, Reputation

Reputation has always been important, but now it's critical for your digital marketing success

AI Looks for:

- Mentions of specific staff members by name
- Detailed descriptions of amenities and care quality
- References to medical capabilities and responsiveness
- Specific location and care type identifiers



Encourage reviewers to mention specific staff members, amenities, and care types. This will put you ahead when it comes to your reviews and AI search.

LeadingAge Illinois

Change Makers
2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Don’t Lose Your Voice

As more and more organizations begin to use AI, it’s all important to stand out from the crowd rather than sounding like everyone else.



Brand Protection

- Create a strong brand and tone guide for any LLMs to follow
- Make sure you have the “human element” in place to review.
- Watch out for “drift” and make sure that AI stays on task
- Ensure that your materials are protected

LLMs tend to “drift” over time and change from what you originally asked for, so having a brand and tone guide that you can use for reference helps with keeping things on track.

LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Interested in Learning More?

We've compiled a document that includes the "Do's and Don't's" of AI in senior living, with compliance and brand integrity in mind.

Download the Guide

Reach out to learn more about integrating AI into your organization to help supercharge your team members and provide them the tools they need to succeed.

LeadingAge Illinois

Change Makers

2026 LEADINGAGE ILLINOIS ANNUAL CONFERENCE

Reach Out to Us to Learn More



Fran Palma

Chief Marketing & Digital Strategy Officer

Covenant Living

FMPalma@covliving.org



Dylan Pattenaude

National Director of Digital Strategy

Open Strategy Group

DCPattenaude@covliving.org

LeadingAge Illinois

Thank You

Questions?