



AI in Senior Living: Do's and Don'ts

AI is rapidly becoming part of how senior living communities market, communicate, and operate. However, adopting it effectively requires more than just using new tools; it requires clear guardrails, thoughtful implementation, and a deep understanding of resident and prospect trust. At Open Strategy Group, we help senior living organizations navigate AI with intention, balancing innovation with compliance, brand integrity, and real business outcomes. If you're exploring how AI can support your marketing, sales, or operations, our team is here to guide you with a strategy-first approach.

The Do's of AI in Senior Living

DO protect resident and prospect privacy

AI tools should never compromise sensitive information. Use anonymized or aggregated data whenever possible, and ensure your team understands what should—and should not—be shared.

DO use AI for insights, not sensitive decision-making

AI is powerful for identifying trends, summarizing information, and improving workflows. It should support your team and not replace human judgment, especially in areas involving care, finances, or personal situations.

DO implement clear internal guideline

Set defined rules for your team around:

- Approved tools
- Acceptable data inputs
- Proper usage across marketing and sales

Most AI risk comes from unclear processes and not bad intentions.



DO choose trusted, vetted platforms

Work with AI tools that offer:

- Clear data privacy policies
- No training on your data (when possible)
- Proper data processing agreements (DPAs)

Your vendors matter just as much as your internal practices.

DO maintain transparency in how you use AI

As AI becomes more integrated into communication and marketing, being clear about how data is used builds trust with prospects and families.

DO keep human oversight in place

Every AI-generated output should be reviewed by a human. This ensures tone, empathy, and appropriateness align with your brand and audience.

DO focus on enhancing and not replacing the human experience

In senior living, relationships drive decisions. Use AI to streamline operations and improve responsiveness, but always keep the human connection at the center.



The Don'ts of AI in Senior Living

DON'T input sensitive personal or prospect data into AI tools

Avoid entering:

- Names, emails, phone numbers
- Health or financial information
- CRM notes or internal deal details

Once entered, you lose full control over how that data is stored or used.

DON'T assume AI tools are fully secure or private

Many platforms collect, store, and reuse data in ways that aren't always obvious. Always verify how data is handled before using a tool.

DON'T overlook compliance requirements

Using AI with prospect data can create risk under regulations like:

- GDPR
- CCPA

Make sure your privacy policy and data practices reflect how AI is being used.

DON'T allow "shadow AI" usage across teams

When team members independently use tools without oversight, it creates:

- Data risk
- Lack of accountability
- No visibility into usage

AI adoption should be structured—not fragmented.



DON'T rely on AI for profiling or sensitive segmentation

AI-driven targeting based on:

- Health status
- Financial situation
- Personal circumstances

can quickly cross ethical and legal boundaries—especially in senior living.

DON'T over-automate communication

AI-generated outreach can feel:

- Impersonal
- Overly intrusive
- Inappropriate for sensitive situations

Balance efficiency with empathy—always.

DON'T sacrifice trust for convenience

The biggest risk with AI isn't the technology—it's how it impacts perception. In senior living, trust is everything. Once lost, it's difficult to regain.



AI Readiness & Responsibility Checklist for Senior Living Teams

AI Usage Awareness

- Our team is currently using AI tools (ChatGPT, Copilot, etc.)
- We know which teams are using AI (marketing, sales, ops)
- We understand how AI is being used day-to-day

If these aren't checked, you may have "shadow AI" risk.

Data & Privacy Safeguards

- We do NOT input personal or prospect data into AI tools
- We have guidelines on what data can be used
- Our privacy policy reflects AI usage
- Our AI tools are vetted by leadership or IT

Compliance & Risk

- We've reviewed AI usage against GDPR/CCPA (if applicable)
- We understand where our data is stored
- We know if our AI tools use data for training

Team Governance

- We have internal AI guidelines or policies
- Our team has been trained on AI do's and don'ts
- We limit usage to approved tools

Human Oversight & Brand Protection

- All AI-generated content is reviewed before use
- Messaging aligns with our brand voice
- We avoid over-automation in sensitive communications

Strategic Use of AI

- We use AI for insights (not just content generation)
- AI supports and doesn't replace our team
- We have clear goals for AI usage (efficiency, lead quality, etc.)

Score Your Readiness

20–24 checks → Strong foundation. Reach out to fine-tune your initiatives.

12–19 checks → Opportunity to improve. Reach out for strategic recommendations.

Under 12 checks → AI likely being used without structure. Reach out for full advice.

Contact us at openstrategygroup@gmail.com or (877) 202-4002 for a free AI consultation