toodlebox

AI STRATEGY PLAN

Prepared for

Larkfield Senior Living

Naperville, Illinois

November 2026

Prepared by the Toodlebox team

Disclaimer: This is a sample report. Larkfield Senior Living is a fictional company created to show what a completed AI Strategy Plan may look like for your communities. The data in this report is fictional. The format of this document may vary as well as the presentation of the material.

01 Executive Summary

Larkfield Senior Living operates three communities in the western Chicago suburbs: two assisted living communities and one memory care community, with about 180 residents in total. This plan is based on a 45-minute deep-dive session with the executive director, the business office manager and the community managers, followed by a review of how work actually moves through each community day to day.

The short version: resident care is strong, but a lot of the work around it is manual. Income reports, staff questions about changing procedures, monthly newsletters, and move-in paperwork all depend on someone doing them by hand — usually the same few managers. That's time that would otherwise go to residents and their families.

12 hrs/wk	6	2 weeks
admin time identified	opportunities ranked	to first three live

Where the time is going today

Recurring task	Who	Hrs / week
Answering repeat policy and procedure questions	Community Mgrs.	4–5
Collecting and tracking move-in paperwork	Business Office	3–4
Compiling monthly newsletters and family updates	Community Mgrs.	2–3
Building the twice-monthly income report by hand	Business Office	~1
Total identified		~12

Not included above: re-keying census and occupancy numbers into the ownership reporting template, which takes 4–6 hours per community each month. That's a separate, month-end cost — addressed under Census & Occupancy Reporting in Phase 2.

The team

- An executive director and business office manager at each community, three community managers, and roughly 120 care, dining and housekeeping staff working across every shift.
- Everyone already works inside Microsoft 365 and Teams — email, scheduling, and most file storage run through it today.
- No in-house IT team; an outside managed service provider handles the technology, and day-to-day software questions fall to the business office manager on top of her regular workload.

02 Priority Matrix

Every opportunity we identified, ranked by impact to Larkfield and how quickly it can be in place.

#	Opportunity	Impact	Timing	Measured in
1	**Recurring Income Report**	High	Week 1	~4 hrs / month

#	Opportunity	Impact	Timing	Measured in
2	**Policy & Procedure Assistant**	**High**	Week 1	~4–5 hrs / wk
3	**Move-In Paperwork Tracking**	**High**	Week 2	~3–4 hrs / wk
4	**Newsletter & Content Drafts**	**High**	Week 2	~2–3 hrs / wk
5	Census & Occupancy Reporting	**Medium**	Phase 2	4–6 hrs / mo each
6	Staff Onboarding Assistant	**High**	Phase 2	*New-hire ramp time*

Opportunities 1–4 are the focus of this engagement and the two-week plan that follows. Items 5 and 6 are worth revisiting once those are running.

03 The Recommendations

Detail on the four opportunities we'd tackle first — what's happening today, what we'd change, and what it's worth.

1. Recurring Income Report

TODAY	RECOMMENDED
The business office manager builds the income report by hand from 7 spreadsheets, about 2 hours each time, twice a month. Numbers are copied between files, and one late correction means rebuilding it.	The report is assembled automatically from the same 7 spreadsheets on a set schedule. The business office manager reviews it in about 5 minutes and approves it before it goes to ownership. Anything that doesn't reconcile is flagged.

~4 hrs/mo
reclaimed

Week 1
live by

2. Policy & Procedure Assistant

TODAY	RECOMMENDED
Procedures change often, so the answers to common questions keep changing too. Community managers field the same questions from staff on every shift — 25 to 30 a week — and the answer can depend on who's asked.	A Teams-based assistant built from Larkfield's current policies and procedures. Staff ask it directly and get the answer with the source to check. It's updated whenever a procedure changes, and anything it can't answer goes to the manager.

~4–5 hrs/wk
reclaimed

Week 1
live by

3. Move-In Paperwork Tracking

TODAY	RECOMMENDED
Each move-in means collecting payment and billing details, contact information, signed agreements and welcome materials, tracked on paper and email. Missing items often turn up on move-in day.	A checklist for every move-in that tracks each item as it arrives and reminds families about anything outstanding. The assistant can pull up any item on the spot.

~3–4 hrs/wk	Week 2
reclaimed	live by

4. Newsletter & Content Drafts

TODAY	RECOMMENDED
Community managers gather newsletter items — events, birthdays, menu notes — from several staff and write every draft from scratch, one per community.	Staff drop items into a shared form through the month. AI shapes them into a first draft in each community's voice, and the manager reviews and finalizes it before it goes to residents and families.

~2–3 hrs/wk	Week 2
reclaimed	live by

04 Getting to Launch

Roughly two weeks from kickoff to having the first few workflows live — but the exact path depends on a few things we sort out together early on: how you want things hosted, who's the right point of contact on your team to liaise with, and which workflow makes the most sense to tackle first given what's on your plate. The shape below is typical, not a fixed script.

Phase	What happens
Week 1 Setup & first workflow	Confirm hosting, access and data rules — what can go into AI, any agreements needed first, and who's the point of contact. Agree on which workflows go live first. For Larkfield that's the income report and the policy assistant: two quick wins. Configure them and test with a small group — one community's business office and managers — before they go any wider.
Week 2 Rollout & next workflows	Expand to all three communities, adjusting based on what the pilot group ran into. Configure and launch the next one or two workflows — pace depends on how Week 1 went and what the team can absorb. Walk through everything that's live together, and map out where Phase 2 fits.

05 What Happens Next

This report is the starting point, not the finish line. Here's how it plays out from here:

- We walk through every recommendation on a live 30-minute call — you leave with a confirmed first move, not a document to interpret alone.
- The two-week plan above kicks off immediately after that call, with no separate onboarding process.
- Phase 2 opportunities (census and occupancy reporting, staff onboarding) are revisited once the first four are running and the team has a feel for how this works.
