



Carlton Senior Living Meets Staffing Needs via Contextual Alexa

Introduction

Carlton Senior Living (Concord, CA) provides exceptional senior living options in northern California, including Memory Care, Independent and Assisted Living. Carlton has been included in Forbes Best Place to Work for several years and prides itself on the investment it makes in its staff. With staffing challenges across the industry, what many call the "Staffing Apocalypse," Carlton has created innovative ways to reduce the staffing challenge while providing additional services to their residents and families. By deploying Amazon Alexa, Carlton has accomplished an amazing trifecta of benefits, including promoting consistency of communication between residents, families, and staff, empowering residents to voice their needs, and improving staff efficiency.

Senior Living Industry Challenges

Many senior living providers have conflicting challenges. They must operate for their existing customers while appealing to a new, more tech-savvy demographic, all while attracting and maintaining staff. While this challenge is typical for any business, it is magnified in senior living because there are three customers to consider: residents, families, and staff. You read that right. Included in the "customer" bucket is staff. While technically, staff is paid for their time and work, more and more, the successful operators are treating their staff like customers—people they need to attract and keep engaged and happy. Identifying and treating staff as a customer rather than an employee has been a real differentiator for Carlton.

"We invest heavily in our staff. From the day they are hired to annual, monthly, and weekly check-ins, we prioritize staying engaged with our staff. Carlton provides live training, amenities, benefits, and flexibility because our staff matters as much to us as any other asset." says President Dave Coluzzi, who has been running Carlton for 8 years and has been a leader in the industry for 34 years. "There's a reason we show up on 'Best Places to Work' lists. It's because we listen to staff, appreciate their perspective, and strive to meet their needs."

Even with the investment in staffing, we continue to face a wall, as only so many people are available to fill roles. "We had to get creative," Coluzzi says, "so we started looking at the tools right in front of us." Utilizing technology to help enhance communication has increased over time, and this technology has been especially useful in ensuring those we employ succeed in a



person-centered care approach. “We had to apply technology, the tools people already have in their day-to-day lives, to make ourselves more efficient and attractive to everyone in the ecosystem,” says Taren Petros, VP of Business Operations & Technology. Carlton turned to Amazon for help and participated in the Amazon Device Donation program in 2020. “Amazon donated 1,000 Alexa devices to our residents to help during Covid. We jumped at the opportunity!” says CFO Chung Chow. With this decision, Carlton set itself on the path to innovative success.

Amazon Alexa Provides Context

“Alexa, I need a nurse.” This simple phrase benefits residents, making it easier to ask for help, but the real value is in what happens next when Alexa responds, “OK, here’s Speak2. What kind of help do you need?” Once a resident provides additional details about their needs, the request can be routed to the appropriate person because the request now includes context. Sometimes a caregiver or nurse isn’t required at all, and the device can supply an answer with proper content. For instance, if the resident’s request was to ask a nurse what activities the community offered that day, the device itself could answer that question, alleviating the nurse from having to make a stop on their daily rounds to answer this resident’s call.

Carlton began working with Amazon partner Speak2, a New York-based senior living platform that focuses on Alexa. The challenge was determining a way to utilize Alexa to lessen the burdens on staff serving as the primary resource for providing information and services in real-time. “Carlton wanted to make it possible for their residents to ask for help and provide as much information as possible so they could triage incoming requests. So instead of pressing a pendant for non-emergencies, they could ask for information or request a specific department—dining, maintenance, or housekeeping—making it easier for staff to manage their time,” notes Matt Smith, CEO of Speak2. This problem has been vexing the industry for years, and the solution is now evident with Alexa. “People struggle with screens and apps as they age, so providing iPads or apps never clicked. With Alexa, they just had to ask in plain language - problem solved,” adds Smith.

Speak2 provides a program where everyone can use technology with an interface that makes sense for them. Speak2 connects residents, family members, and staff by tying apps, web, and Alexa into one platform. Staff is mobile, so they use the app. Management often uses a hybrid of the app and web, and residents use the Alexa device. “It creates a unique situation where everyone is in contact and fully informed without having to think about it. It’s just part of the



flow of the day,” says Jennell Revera, Executive Director at Carlton’s Elk Grove location. “My staff loves the app. Moving away from old-school systems empowers them. They make announcements, schedule daily reminders and can take attendance in real-time. Meanwhile, residents can ask Alexa for information, call the front desk, and even book rides. It’s an amazing transformation.” she says.

Most importantly, the efficiency of utilizing Alexa has allowed us to decrease the number of transactions between the initial resident request and resolution. With the ability to directly route resident requests to the correct department, Carlton has strengthened awareness and oversight of time management. This insight has allowed us to focus on our existing staffing priority to ensure we continue staffing to care needs across all departments.

Jess Beck, MSW and Director of Communications, paints the picture: “Our front desk staff has reduced the time they spend answering basic questions and, thus, have decreased engagement data entry by about 80%. In addition, our care staff are aware of what is needed and can prioritize those needs appropriately—a testament to the utilization of Alexa, which allows residents to share exactly what they need, so the requests are routed directly to those departments. The numbers speak for themselves.”

Carlton has determined that by utilizing the triage system that Speak2 provides, we can decrease the time staff is involved in addressing non-urgent requests. “When we looked at the impact, we were elated. The time care staff attended to non-care needs was equivalent to an entire employee per shift.” See Table 1. Carlton Aggregated Analytics below. “Sometimes you have to think outside the box. It was important for us to try something different, to use the tools already at our disposal. Households across the country were already using Alexa, so it made sense for us to use it for business. The resolve was simple, and it’s proven to be a bigger success than we even anticipated,” Coluzzi summarizes.

Table 1. Carlton Aggregated Analytics

Data aggregated and averaged, assume one facility with 125 residents.

Problem Statement	Pre-Alexa	Post-Alexa	Impact
Pendant requests made per day	326	112	Resident “emergency” pendant requests lowered by 34%.



Front Desk time spent on triaging requests	326 x 1.5 minutes = 489 minutes per day or 8.15 hours per day 244.5 per month	Request triage by Front Desk has decreased	Equivalent of 1 shift refocused to other priorities.
Attendance and Unscheduled Engagement	1 hour per day x 30 days = 30 hours per month	10 minutes per day to validate x 30 days = 5 hours per month	Alexa eliminates 25 hours of staff time related to data entry per month.
Pendant presses related to community content	Paper based Community Content and requests via pendant presses	85 community content requests per day	Correlates to a reduction in pendant presses and content via Check In.
Duplicate visits per request on average	47 care staff visits per day required a different resource. Average time spent = 7 minutes 329 minutes or 5.4 hours per day	4 care staff visits per day require different resources. 7 minutes * 4 = 28 minutes	91% reduction. Care staff re-focused on scheduled tasks.

Context Adds Efficiency

The partnership between Carlton Senior Living, Alexa Smart Properties, and Speak2 has proven successful by equipping residents, family members, and staff with technology that helps reinforce, improve, and maintain prioritization of a person-centered care approach. The triage system has positively impacted staff time. Regarding non-urgent requests alone, there is an 83% reduction in data entry, a 91% reduction in duplicate visits, and a 34% reduction in resident emergency pendant requests. By deploying Amazon Alexa, Carlton has greatly reduced the hours staff spends on triaging requests. These devices have empowered residents to vocalize their specific needs, which, in turn, has improved staff efficiency.