CASE STUDY:

Carlton Senior Living Meets Staffing Needs via Alexa-Enabled Solutions

Carlton Senior Living (Concord, CA) provides senior living options in northern California, including Memory Care, Independent and Assisted Living. Carlton has been included in Fortune's "Best Workplaces in Aging Services 2022" 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.

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. Identifying and treating staff as a customer rather than an employee has been a differentiator for Carlton.

"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," says President Dave Coluzzi.

Even with the investment in staffing, there are only so many qualified people to fill roles. "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.

Transforming Resident and Staff Communication

Carlton began working with Amazon partner Speak2, a New York-based senior living technology platform that builds solutions for Alexa. The challenge was determining a way to utilize Alexa to lessen the burdens on staff. "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. Instead of pressing a pendant

> *"Alexa allows residents to share exactly what they need, so our care staff can prioritize…"*

for non-emergencies, they could ask for information or request a specific department, making it easier for staff to manage their time," notes Matt Smith, CEO of Speak2. "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.

Staff are mobile, so they use the Speak2 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 love 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.

Remarkable Staff Efficiency

Most importantly, the efficiency of utilizing Alexa has allowed Carlton to decrease the number of transactions between the initial resident request and resolution.

Jess Beck, MSW and Director of Communications, paints the picture: "Our front desk staff has reduced the time they spend answering basic questions, which in turn decreased engagement data entry by about 80%. Alexa allows residents to share exactly what they need, so our care staff can prioritize and route those requests to the appropriate department. The numbers speak for themselves."

Carlton has determined that by utilizing the triage system that Speak2 provides, they can decrease the time staff are involved in addressing non-urgent requests. "When we looked at the impact, the time care staff attended to non-care needs was equivalent to an entire employee per shift," Coluzzi summarizes.

A Partnership with Real Results

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. Regarding non-urgent requests alone, there was an 83% reduction in data entry, a 91% reduction in duplicate visits, and a 34% reduction in resident emergency pendant requests. By deploying Alexa, Carlton has empowered residents to vocalize their specific needs, which has improved staff efficiency.

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* "Interview with Dr. David Grabowski," Leading Age, January 12, 2022