Prospect Summarization in CRM using AI

Problem, Approach, and Results

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Agenda

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1. **About LCS**
   Our history, communities, operational depth
2. **The Sales Challenge**
   Prospect journey, unstructured notes, the need for speed
3. **Our Approach**
   Stakeholders, feedback process, user-centered design
4. **Solution and Architecture**
   From scattered data to sales snapshots , solution stack
5. **The Human Element**
   Pilot user group, feedback loops, operational considerations
6. **Results and Measuring Success**
   Adoption metrics, behavioral changes, bottom line
7. **Q&A**
   Open discussion and questions


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LCS®

Community Operations | Development | Group Purchasing | Real Estate

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120
Managed Communities

28	81	41	70	50
States LCS operates communities in	Third-Party Managed Communities	Non-Profit Communities	Life Plan Communities	Rental Communities

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LCS COMMUNITY OPERATIONS

Depth & Breadth of Resources

Finance Management
Operational insight and financial stewardship to help communities achieve long-term sustainability.

Food & Beverage
Expert food and beverage services that elevate dining experiences and support resident well-being.

Health Services
Integrated support to optimize clinical care and deliver community-based senior care services.

Marketing & Sales
Tactics and insights to attract residents, strengthen your brand, and remain competitive in your unique market.

Legal & Compliance
Proactive strategies to meet regulatory requirements and elevate standards of care.

Risk Management
Solutions that support lower insurance costs, reduce risk, improve response, and protect residents and organizations.

Strategic Planning
Smart planning driven by data and market analysis to align your operations with future goals.

Technology Support
Technology that ensures regulatory compliance, advances performance, tracks metrics, and simplifies day-to-day operations.

Human Resources
Strategies that strengthen teams through recruitment, development and retention to foster a thriving workplace culture.

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2026

High-Level Imperatives

Health & Wellness
Elevate our residents' experience focused on the pursuit of living well longer.

Innovation & AI
Redefining how we work and shaping our industry with bold thinking and fresh ideas.

Optimize Majority-Owned
Accelerate value creation across LCS communities through focused optimization and alignment.

Standardization
Leveraging scale by applying best practices to increase efficiency, execution, and improve results.

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Prospect Sales Journey

Inquiry → Connect → Engaged → Waitlist → Deposit → Move In

- **Inquiry** – Initial contact focuses on verifying outreach reasons, accurate details, decision-makers, and next steps to ensure follow-up.
- **Connect** – First two-way interaction uncovers prospect needs, timing, and influencers, building trust and personalized communication.
- **Engaged** – Visits and conversations address objections, align solutions, and strengthen emotional bonds with prospects.
- **Waitlist / Deposit** – Clear timelines, updates, deposits, and reassuring communication to maintain momentum and ensure confidence.
- **Move In** – Warm welcome and seamless handoff; lost stage captures lessons and future opportunities.

← **3-18 Months** →

Salesforce often has the information.
Understanding still takes work.

A Mass of Unstructured Information

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[redacted]

Description:

[redacted]

Description:

[redacted]

Description:

Activity Notes:

[redacted]

Key knowledge lives in notes, but…

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Notes are fragmented and long

Information is spread across activities, calls, emails, and time.

Understanding takes time

Sales counselors spend valuable time re-reading and piecing together context.

Details get missed

Key preferences, risks, and signals can be overlooked in long notes.

Context fades over time

It's hard to remember what happened weeks or months ago.

Uneven handoffs across the team

Every counselor interprets the notes differently, leading to inconsistent follow-up.

Sales should understand the lead in seconds, not minutes

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What Matters Most

Surface What Matters
Highlight the most important details, signals, and risks up front.

Save Time, Reduce Effort
Cut through noise and eliminate the need to read everything.

Preserve Context
Keep the story and history intact so nothing gets lost.

Be Accurate and Trustworthy
Information must be reliable, sourced, and easy to trust.

Be Grounded in the Lead
Focus on what's relevant to this lead, not generic or one-size-fits-all.

Support Confident Conversations
Equip sellers with clarity to talk about the lead with confidence.

Improve Handoffs
Make transitions seamless with a clear, complete picture of the lead.

Quick to Scan
Easy to skim and understand in seconds so sellers can stay focused.

Our goal: Deliver a summary that helps sellers quickly understand the lead, build confidence, and take meaningful next steps.

Cross-functional Initiative

Sales

Sales Counselors
Front-line prospect engagement

Sales Managers
Team oversight & pipeline strategy

Sales Operations & Enablement
Process optimization & training

Corporate Sales Leadership
Strategic direction & governance

Data & Technology

Data Science
AI model development & tuning

Data Engineering
Data pipelines

Data Analytics
Dashboards & Insights

Salesforce Team
CRM integration & platform support

Stakeholder Feedback Process

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1 Show the possibilities

Narrative summary
Richer context, more inference

Assistant summary
Structured interpretation

Snapshot / HUD
Fast scan, minimal reading

Goal: test the edges before choosing the design.

2 Review with SMEs

The prototypes made tradeoffs visible:

Useful	What helps the rep move faster?
Risky	Where does inference go too far?
Missing	What critical context is absent?
Display	What belongs in Salesforce?

3 Lock the requirements

Each field has a clear job:

2–3 sentence summary	Last update date
Decision maker	What matters most
Financial context	Timing signals
Concerns	Potential risks
Personal details	

Process Flow: Raw Data to Insight

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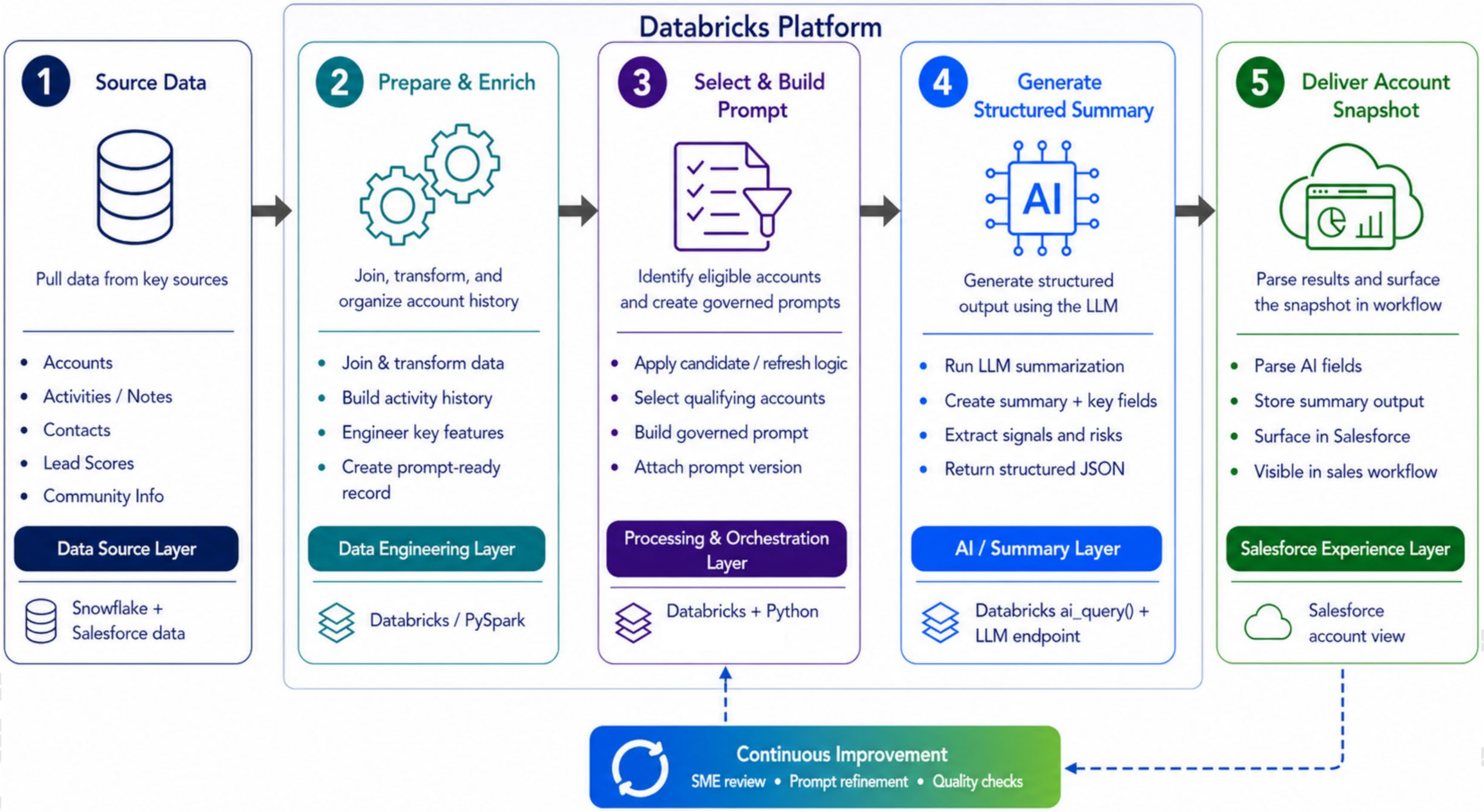

Source Data

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1 **Source Data** Key CRM inputs	2 **Prepare & Enrich** Join & organize history	3 **Select & Build Prompt** Governed prompt creation	4 **Generate Structured Summary** LLM returns structured fields	5 **Deliver Account Snapshot** Surface in workflow

Data Source Layer • Snowflake / Salesforce

Accounts
Lead status, tours, inquiry dates, next activity, deposit status

Activities / Notes
Historical notes and activity trail across the relationship

Contacts
Family roles, relationship context, and support network

Lead Scores
Existing scoring signals used to help prioritize qualifying accounts

Community Info
Community context tied to the account and reporting structure

Survey Data (QPRO)
Preference, lifestyle, budget, and move-planning signals

Prepare the Data

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1 Source Data
Key CRM inputs
→
2 Prepare & Enrich
Join & organize history
→
3 Select & Build Prompt
Governed prompt creation
→
4 Generate Structured Summary
LLM returns structured fields
→
5 Deliver Account Snapshot
Surface in workflow

Data Engineering Layer • Databricks / PySpark

1. Join source tables

Bring together accounts, tasks, events, contacts, survey data, and lead scores into one working record.

2. Filter meaningful activity

Keep completed, relevant activity and remove low-signal outbound noise so the timeline reflects real engagement.

3. Build activity history

Sequence notes chronologically and assemble a readable account history across the relationship.

4. Add relationship context

Attach contact roles, family context, community details, and survey signals that help explain the lead.

5. Engineer key features

Calculate note volume, latest activity, deposit status, lead score, and other fields used downstream.

6. Create a prompt-ready record

Output a structured account record that is ready for candidate selection and prompt construction.

The Art of Prompt Building

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1 Source Data — Key CRM inputs → 2 Prepare & Enrich — Join & organize history → 3 Select & Build Prompt — Governed prompt creation → 4 Generate Structured Summary — LLM returns structured fields → 5 Deliver Account Snapshot — Surface in workflow

Processing & Orchestration Layer • Databricks / PySpark

What We Did

What It Is
A structured runtime contract between your data and the LLM

How We Built It
Three layers: Rules → Output Schema → Live Data

What Makes It Work
Precision rules eliminate ambiguity before the model sees the data

How We Manage It
Versioned and traceable like source code through every pipeline stage

How It Evolves
Iteration driven by real output review, not theory

The Three Layers

RULES & INSTRUCTIONS

↓

OUTPUT SCHEMA

↓

LIVE DATA

Assembled at runtime. Versioned like code.

Generate the Summaries

1	2	3	4	5
Source Data Key CRM inputs	**Prepare & Enrich** Join & organize history	**Select & Build Prompt** Governed prompt creation	**Generate Structured Summary** LLM returns structured fields	**Deliver Account Snapshot** Surface in workflow

AI Summary Layer • Databricks / Model Endpoint

What We Did

The Task
Send each rendered prompt from Databricks to an LLM endpoint and receive structured JSON back

The Challenge
Dozens of available models with wildly different cost and quality profiles

How We Measured Quality
Built an LLM-as-Judge framework scoring every output on four criteria

How We Measured Cost
Projected annual spend per model before committing to any

The Decision
Selected the model that cleared the quality bar at the lowest sustainable cost

How We Made the Call

1. EVALUATE QUALITY
LLM-as-Judge

→

2. ESTIMATE COST
Initial run, ongoing, and annual cost

→

3. SELECT THE MODEL
Best quality per dollar

Same framework reusable as new models enter the market.

The Account Snapshot

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1 **Source Data** Key CRM inputs → 2 **Prepare & Enrich** Join & organize history → 3 **Select & Build Prompt** Governed prompt creation → 4 **Generate Structured Summary** LLM returns structured fields → 5 **Deliver Account Snapshot** Surface in workflow

Account

[redacted] (Self)

Summary

The lead is considering a move to Independent Living, having had 3 tours, with the most recent visit on 2026-04-06 showing increased seriousness about making a move [A4]. [redacted] are the key individuals, with [redacted] ready to sell his home and [redacted] planning to keep hers [A2]. They are considering [redacted] alongside competitors Evergreen Woods and Sunrise Ridge [A2][A4]. Next follow-up is scheduled for 2026-05-14 [ACCOUNT FACTS].

Summary Date

4/13/2026

Decision Maker

[redacted] [A2]

What Matters Most

2 bed deluxe with den [A2], availability on waitlist [A4]

Financial Context

[redacted] is selling his home of 42 years in Fairfield, [redacted] owns a home in Watch Hill that she plans to keep and use seasonally [A2]

Timing Signals

Considering move in next few years [A3], getting more serious about making the move [A4], next follow-up on 2026-05-14 [ACCOUNT FACTS]

Concerns

waitlist availability at 90 years old [A4]

Potential Risks

age (90) may impact waitlist timing [A4]

Personal Details

[redacted] has 12 grandkids, was married until his wife passed in 2010 [A2], friends with [redacted], and others at Essex Meadows and competitors [A2][A4]

Pilot and Feedback Loop

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Pilot Feedback & Continuous Improvement

The Pilot Group — Cross-functional sales reps across diverse communities and markets

The Feedback Loop — Regular sessions and usage signals drove prompt and format changes continuously

Gradual Release — Expand only as quality and trust grow

Built-in Feedback in Salesforce

Was This Accurate? Yes / No

Used as a Yes/No label

AI Summary Feedback

Share your feedback...

Every run is logged. Every account is tracked. The system knows its own history.

Measuring Success

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1. ADOPTION

Are teams using the summary regularly and consistently?

Usage Rate

% of active users viewing summaries and # of summary views

Repeat Usage

Frequency of return usage by counselors

Adoption Over Time

Growth in users and usage week over week

User Feedback

Satisfaction and perceived value from pilot users

2. WORKFLOW IMPACT

Does it save time and improve how teams work?

Time to Understand

Reduction in time to get up to speed on a lead

Workflow Fit

Does it fit naturally into the sales workflow and get used in real work?

Handoff Effectiveness

Improvement in continuity and context during handoffs

Confidence in Next Actions

Increase in confidence in recommended next steps

3. QUALITY & OUTCOMES

Are summaries high quality and driving better outcomes?

Summary Quality

Evaluate summary quality using LLM-as-Judge and direct user feedback.

Better Notes, Better Summaries

Track improvements in note quality (completeness, structure, key details) and its correlation with summary quality

Business Outcomes

Impact on conversion rate (Inquiry — Tour — Move-In), speed between sales activities, and other key conversion metrics

In "Summary"…

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Faster prospect understanding, in a way Sales teams can trust.

What questions can we answer?