



Prospect Summarization in CRM using AI

Problem, Approach, and Results

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Agenda

- 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



LCS®

Experience Is
Everything®





Community Operations | Development | Group Purchasing | Real Estate



120
Managed Communities

28

States LCS operates
communities in

81

Third-Party Managed
Communities

41

Non-Profit
Communities

70

Life Plan
Communities

50

Rental
Communities



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

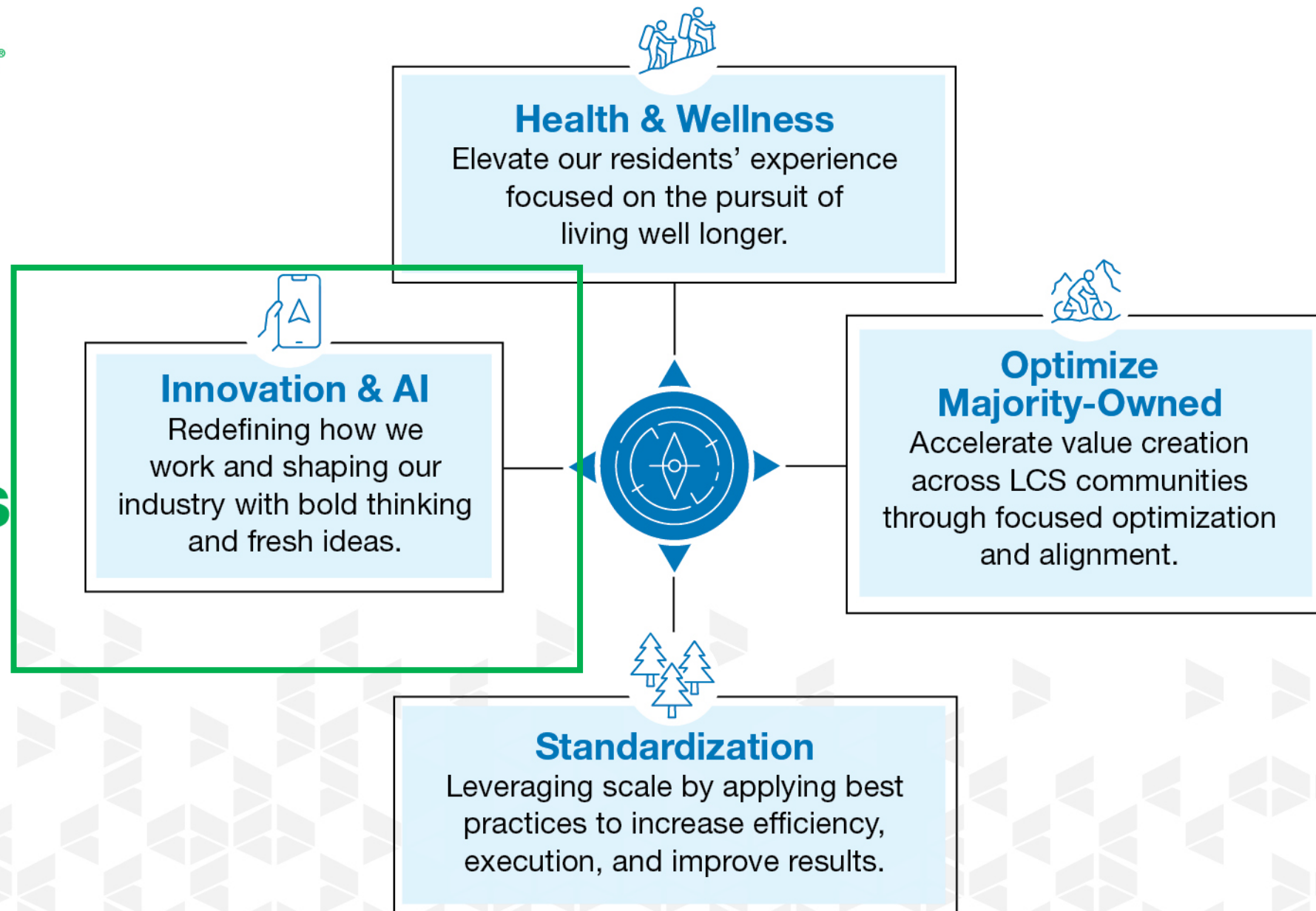
Technology that ensures regulatory compliance, advances performance, tracks metrics, and simplifies day-to-day operations.



Human Resources

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

2026 High-Level Imperatives



Prospect Sales Journey



- **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.**

[illegible]

Key knowledge lives in notes, but...



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



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

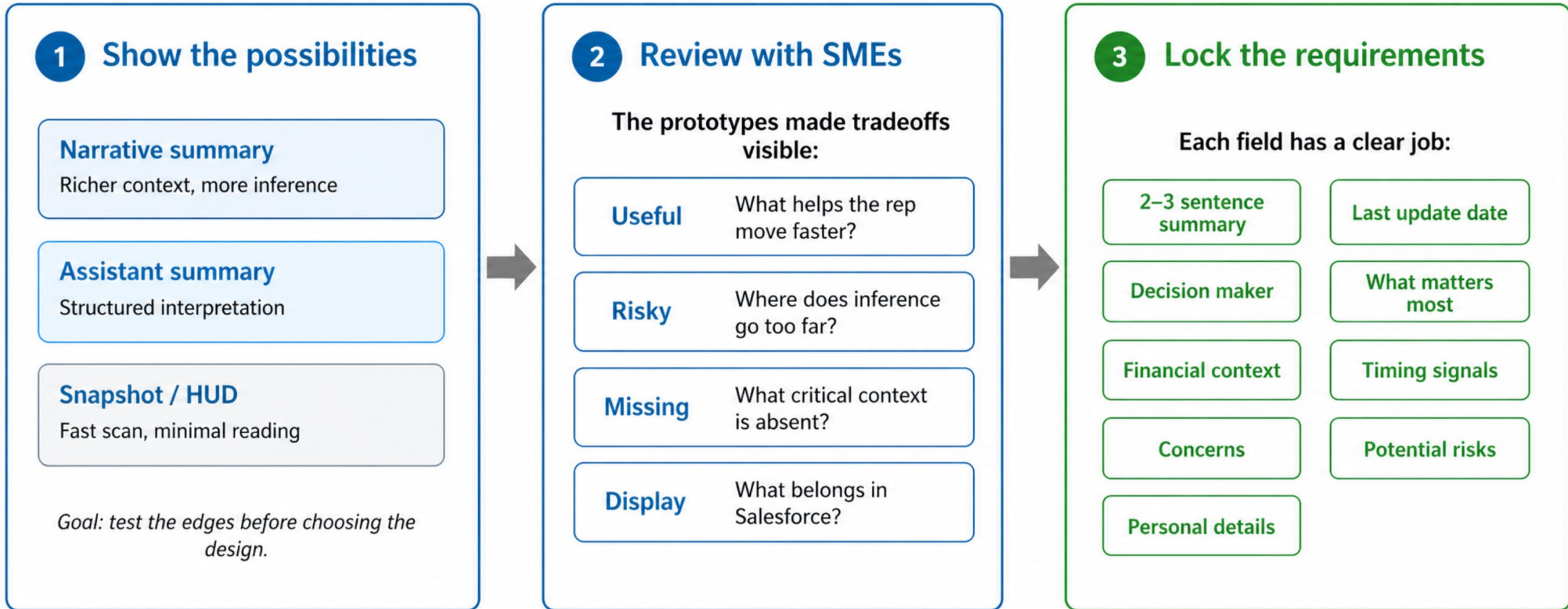
Data Analytics

Dashboards & Insights

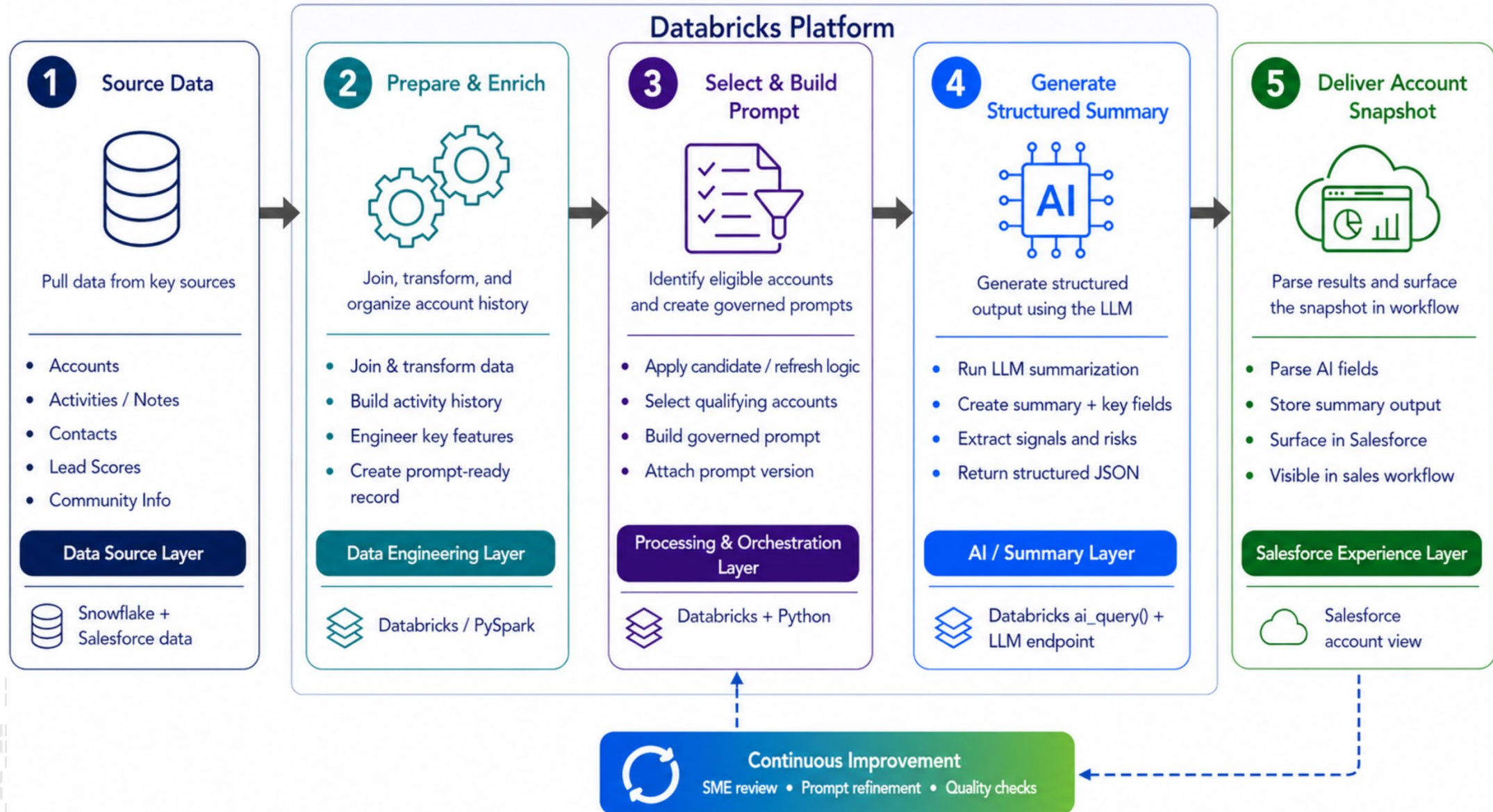
Salesforce Team

CRM integration & platform support

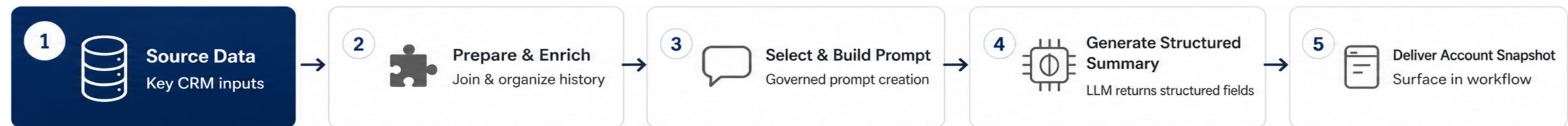
Stakeholder Feedback Process



Process Flow: Raw Data to Insight



Source Data



 **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

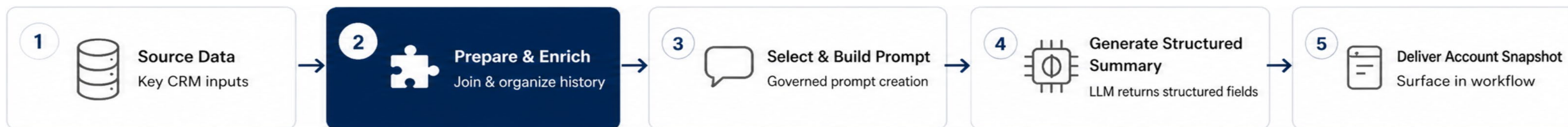


Community Info
Community context tied to the account
and reporting structure



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

Prepare the Data



 Data Engineering Layer • Databricks / PySpark



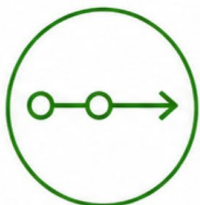
1. Join source tables

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

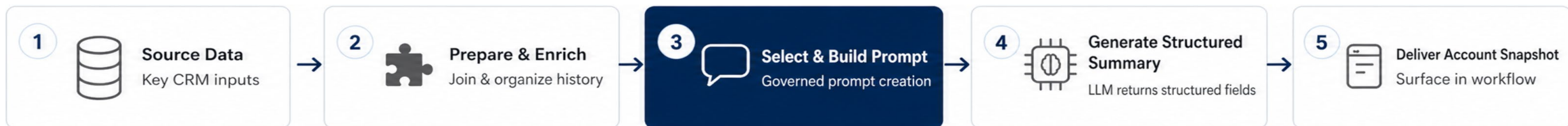
Calculate note volume, latest activity, deposit status, lead score, and other fields used downstream.



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



 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



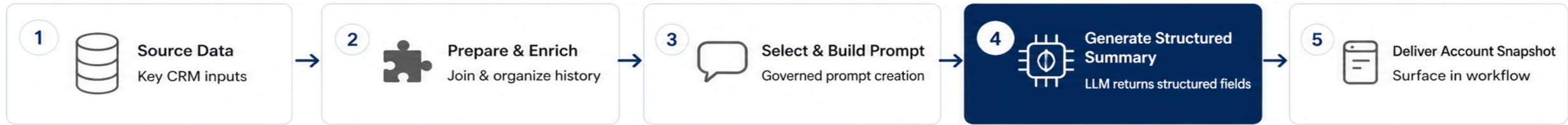
OUTPUT SCHEMA



LIVE DATA

Assembled at runtime. Versioned like code.

Generate the Summaries



 **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

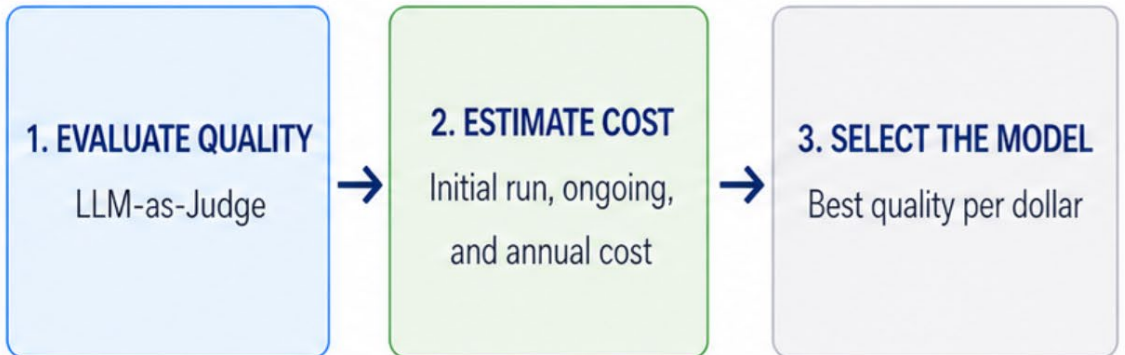
Projected annual spend per model before committing to any



The Decision

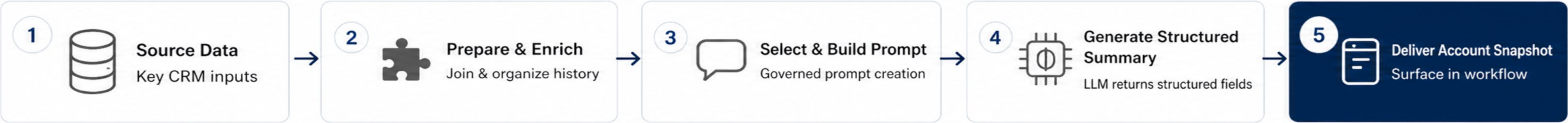
Selected the model that cleared the quality bar at the lowest sustainable cost

How We Made the Call



Same framework reusable as new models enter the market.

The Account Snapshot



Account

██████████(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]. ██████████ are the key individuals, with ██████████ ready to sell his home and ██████████ planning to keep hers [A2]. They are considering ██████████ 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

What Matters Most

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

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]

Potential Risks

age (90) may impact waitlist timing [A4]

Decision Maker

██████████ [A2]

Financial Context

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

Concerns

waitlist availability at 90 years old [A4]

Personal Details

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

Pilot and Feedback Loop



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



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”...

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



What questions can we answer?