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SAVANT-AI Senior Living AI Use-Case Library

Ideas for individual practice, team learning, and governed adoption

A SAVANT-AI, Inc. senior living practice resource

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This library gathers practical ideas observed across senior living leadership and training engagements. The examples have been anonymized, generalized, and organized by the work they support.

Use it to choose one useful problem for today. Start with a low-risk version using information your organization permits you to use. Review every output before relying on it or sharing it.

Three readiness labels

- **Try now:** Suitable for a sandbox using public, synthetic, or approved non-sensitive information.
- **Use approved information:** Useful when your organization permits the relevant files or data to be used in the selected AI system.
- **Plan with leadership:** Requires shared systems, integrations, permissions, governance, or operational ownership.

If a feature such as memory, organizational search, an agent builder, or scheduling is unavailable, use a normal chat. Paste or upload approved context, run the prompt manually, and save the useful result as Markdown, DOCX, or PDF.

A portable starting prompt

I want to improve the following work: [describe the task or decision].

The people who use the result are: [audience].

The result should help them: [desired outcome].

The approved information I can provide is: [sources].

The boundaries are: [privacy, policy, review, and decision limits].

Before doing the work:

1. Ask up to five questions that would materially improve the result.
2. Restate the task, audience, sources, and boundaries for confirmation.
3. Recommend a useful first output that we can test today.

Personal effectiveness and leadership

1. Personal working-context file

Readiness: Try now

Purpose: Create a portable description of your responsibilities, priorities, decision style, communication preferences, and boundaries.

Interview me to create a concise working-context file for an AI assistant. Ask about my responsibilities, current priorities, recurring decisions, audiences, communication style, standards, and boundaries. Do not infer facts I have not provided. Produce the result in Markdown so I can review and reuse it.

2. Writing-style guide

Readiness: Use approved information

Purpose: Turn several suitable writing samples into reusable guidance.

Analyze these writing samples. Describe the observable patterns in tone, structure, vocabulary, sentence length, openings, closings, and calls to action. Distinguish consistent patterns from uncertain observations. Create a one-page style guide and test it by drafting a new message on [topic].

3. Meeting preparation brief

Readiness: Use approved information

Purpose: Prepare for a meeting using an agenda, prior notes, and relevant documents.

Using only the attached approved materials, prepare a meeting brief with: purpose, participants, decisions needed, relevant history, open questions, risks, and the three questions I should be ready to answer. Cite the source for each factual claim.

4. Meeting follow-through

Readiness: Use approved information

Purpose: Convert notes or a transcript into decisions and accountable actions.

Turn these meeting notes into: decisions made, actions with owner and due date, unresolved questions, dependencies, and a concise follow-up message. Mark anything that was discussed but not actually decided.

5. Executive briefing

Readiness: Use approved information

Purpose: Convert several sources into a concise decision-oriented update.

Prepare a one-page executive briefing from these approved sources. Lead with what changed, why it matters, decisions or attention needed, and the evidence. Separate facts, interpretations, and recommendations.

6. Decision perspectives

Readiness: Try now

Purpose: Test a decision through several defined lenses without pretending the AI is the decision-maker.

Help me examine this decision through four lenses: resident impact, employee impact, financial impact, and operational risk. For each lens, identify evidence needed, assumptions, likely tradeoffs, and questions for a human decision-maker. Do not make the final decision for me.

7. Morning priority briefing

Readiness: Use approved information

Purpose: Create a repeatable start-of-day review.

Create a morning briefing from the approved information I provide. Organize it as: urgent today, important this week, waiting on others, risks to watch, and three recommended priorities. Explain why each priority belongs where you placed it.

8. Scheduled briefing specification

Readiness: Plan with leadership

Purpose: Define a recurring prompt before enabling automation.

Help me write a specification for a recurring [daily/weekly/monthly] briefing. Define its purpose, approved sources, schedule, output, recipient, review step, failure conditions, and information it must never include. Then write the prompt that could run manually until scheduling is approved.

9. Turn a successful conversation into a skill

Readiness: Try now

Purpose: Preserve a useful method so another person can repeat it.

Review this conversation and identify the method that produced the useful result. Convert that method into a reusable skill with: purpose, when to use it, required inputs, step-by-step instructions, quality checks, boundaries, and an example. Write it in plain Markdown for a teammate.

10. Teach-back guide

Readiness: Try now

Purpose: Challenge an experienced user to translate knowledge for others.

Help me teach this AI practice to a colleague who has not used it before. Create a ten-minute explanation, a safe example, a three-step exercise, common mistakes, and a way to verify that the person can use it independently. Remove jargon that is not necessary.

Finance and financial planning

11. Variance analysis and narrative

Readiness: Use approved information

Purpose: Identify material variances and explain the operating story behind them.

Analyze this approved budget-versus-actual report. Identify the material variances, show the supporting cells, ask what operational context is missing, and draft a concise narrative. Separate observed numbers from possible explanations.

12. Workbook quality review

Readiness: Use approved information

Purpose: Find formula errors, broken references, inconsistent assumptions, and fragile workbook structures.

Review this workbook for formula errors, broken references, inconsistent assumptions, duplicated logic, and unusual values. Do not change anything yet. Produce a prioritized findings list with cell references and a proposed review sequence.

13. Reconciliation workflow

Readiness: Use approved information

Purpose: Compare two approved financial records and document exceptions.

Compare these two approved records using [matching fields]. Identify exact matches, likely matches, unmatched items, timing differences, and exceptions requiring human review. Explain the matching logic and produce a reconciliation table without altering the originals.

14. Liquidity or cash-position brief

Readiness: Use approved information

Purpose: Consolidate several approved financial sources into a repeatable view.

Using these approved reports, prepare a current liquidity brief showing available cash, restricted cash, near-term obligations, material changes, and questions requiring verification. Cite the source and date for every figure.

15. Loan and covenant tracker

Readiness: Use approved information

Purpose: Extract obligations and deadlines from financing documents.

Extract reporting requirements, financial covenants, notice obligations, deadlines, renewal terms, and default provisions from this approved agreement. Cite the page or section and create a review checklist. State that legal review is still required.

16. Numbers into stories

Readiness: Use approved information

Purpose: Translate a spreadsheet into an audience-appropriate explanation.

Tell the story of this approved financial report for [audience]. Explain what changed, what appears to drive the change, what remains uncertain, and what questions the audience is likely to ask. Use plain language and cite the supporting cells.

17. Financial model challenge

Readiness: Use approved information

Purpose: Test assumptions without allowing AI to approve an investment decision.

Review this model as a skeptical analyst. Identify assumptions with the greatest effect on the result, missing sensitivities, internal inconsistencies, and evidence needed for validation. Do not recommend approval or rejection; prepare questions for the accountable decision-makers.

18. Recurring market-intelligence brief

Readiness: Plan with leadership

Purpose: Define a traceable decision product for market screening or planning.

Help me define a recurring market-intelligence brief for [decision]. Specify the unit of analysis, authoritative public or licensed sources, refresh frequency, evidence standards, human judgments, and conclusions the system must never make independently. Design the report before discussing automation.

Operations and community leadership

19. Monthly operating-report review

Readiness: Use approved information

Purpose: Apply consistent leadership standards to recurring reports.

Review this monthly report against the attached approved standards. Identify strengths, exceptions, missing evidence, follow-up questions, and actions requiring an accountable owner. Do not infer causes that are not supported by the report.

20. Cross-community comparison

Readiness: Plan with leadership

Purpose: Compare performance while preserving consistent definitions and context.

Design a cross-community comparison using [approved measures]. Define each measure, required data quality checks, relevant context, and rules against misleading rankings. Propose a pilot report that helps leaders learn rather than simply label performance.

21. Occupancy forecast rollup

Readiness: Plan with leadership

Purpose: Combine pipeline, move-in, move-out, and community forecasts into a repeatable view.

Map the current occupancy-forecast process from source reports through the leadership rollup. Identify repeated manual steps, conflicting definitions, approval points, and where AI could assist without becoming the system of record. Propose one low-risk pilot.

22. Labor-pattern review

Readiness: Plan with leadership

Purpose: Surface overtime, schedule, demand, and fatigue patterns without automating care decisions.

Design an analysis that surfaces overtime, open shifts, schedule changes, demand patterns, and possible fatigue indicators. Treat care requirements, safety, regulations, and human judgment as hard constraints. Define what the analysis may flag and what it must never decide.

23. Incident documentation template

Readiness: Try now

Purpose: Improve completeness and consistency using synthetic examples.

Create an incident-documentation template for [type of event]. Include observable facts, people notified, immediate actions, required follow-up, and fields that should never contain speculation. Use a fictional example and mark where organizational or regulatory review is required.

24. Training record and reference sheet

Readiness: Try now

Purpose: Turn a completed training activity into durable documentation.

Using this fictional training scenario, create a training record and a one-page employee reference sheet. Include the purpose, steps, responsibilities, escalation path, and comprehension check. Clearly mark all content that must be replaced with approved organizational policy.

25. Process walkthrough to SOP

Readiness: Use approved information

Purpose: Convert a recorded or written process walkthrough into a reviewable SOP.

Convert this approved process walkthrough into a draft SOP with purpose, owner, prerequisites, steps, exceptions, controls, and review date. Mark every ambiguity as a question. Do not fill gaps by guessing.

26. Move-in readiness checklist

Readiness: Try now

Purpose: Create a cross-functional checklist using public or synthetic requirements.

Create a draft move-in readiness checklist covering resident/family communication, operations, clinical review, finance, technology, and welcome experience. Use only the requirements I provide and mark where local policy or regulation must be added.

27. Hospitality or point-of-service workflow

Readiness: Plan with leadership

Purpose: Clarify a store, dining, or hospitality workflow before selecting technology.

Map this hospitality workflow from request through fulfillment, payment, exception handling, and reporting. Identify users, systems of record, handoffs, controls, and failure points. Recommend the smallest pilot that can be tested without resident or payment data.

Resident experience, care, and clinical support

28. Resident life-story activity ideas

Readiness: Use approved information

Purpose: Generate person-centered activity ideas from information the organization is permitted to use.

Using only this approved life-story information, suggest respectful activity and conversation ideas aligned with the resident's interests and history. Avoid medical claims, stereotypes, or invented facts. Present options for a qualified team member to review.

29. Resident redirection idea generator

Readiness: Use approved information

Purpose: Help trained staff consider person-centered approaches without replacing care judgment.

Using the approved nonclinical information provided, suggest several calm, person-centered engagement or redirection ideas. Explain which known preference supports each idea. Do not diagnose, prescribe, or replace the judgment of trained staff.

30. Activity calendar support

Readiness: Try now

Purpose: Turn a fictional calendar into themes, supply lists, and preparation steps.

Review this fictional activity calendar. Create a supply list, preparation timeline, accessibility considerations, backup options, and a short description for residents and families. Ask what organizational standards are missing.

31. Policy-to-documentation review

Readiness: Use approved information

Purpose: Compare a record with an approved policy and identify gaps for human review.

Compare this approved policy with this de-identified example record. Identify where required elements appear, are missing, or are unclear. Cite the policy section. Do not determine discipline, compliance status, or clinical adequacy; prepare findings for qualified review.

32. Clinical-risk rollup design

Readiness: Plan with leadership

Purpose: Define a governed way to aggregate recurring indicators across communities.

Help define a clinical-risk rollup for qualified leaders. Specify approved indicators, source systems, data-quality checks, review cadence, escalation rules, false-positive testing, and decisions that must remain with licensed professionals.

33. Care-level review support

Readiness: Plan with leadership

Purpose: Flag records for qualified review when documented needs and current service levels may not align.

Design a review-support process that flags possible mismatches between documented resident needs and current service levels. Define authoritative data, validation, human review, resident protections, and audit requirements. The system may prioritize review but must not change care or pricing.

34. Family update draft

Readiness: Use approved information

Purpose: Help an authorized professional draft a clear update from verified facts.

Using only these approved and verified facts, draft a clear family update in plain language. Do not add interpretation, prognosis, or reassurance not present in the source. Mark the draft for review by the authorized professional before sending.

35. Fall-pattern learning brief

Readiness: Plan with leadership

Purpose: Analyze aggregated, governed information for patterns and questions.

Design an aggregated fall-pattern learning brief for qualified leaders. Include time, location, contributing-condition categories, data-quality limitations, and questions for human review. Do not predict an individual's risk or recommend clinical action.

People, culture, and learning

36. Employee-handbook question skill

Readiness: Use approved information

Purpose: Answer routine questions with citations while preserving HR review.

Using only this approved handbook, answer the employee's question in plain language. Cite the relevant section, state any ambiguity, and identify when HR review is required. Do not create policy or promise an outcome.

37. Interview preparation from a résumé

Readiness: Use approved information

Purpose: Generate job-related questions without automated hiring judgments.

Using this approved job description and résumé, propose structured, job-related interview questions. Tie each question to a stated requirement, avoid protected characteristics, and do not score or recommend the candidate. Include a consistent evaluation guide for human interviewers.

38. Investigation-documentation organizer

Readiness: Use approved information

Purpose: Organize facts, sources, and unresolved questions without reaching conclusions.

Organize these approved investigation notes into confirmed facts, reported statements, source references, conflicting information, and open questions. Do not determine credibility, fault, discipline, or legal conclusions.

39. Team-prioritization skill

Readiness: Try now

Purpose: Encode shared leadership questions for evaluating work.

Help me create a reusable team-prioritization skill. It should ask about resident impact, enterprise value, cost, effort, urgency, dependencies, risk, and the human perspective. It must show its reasoning, identify missing evidence, and leave the final priority decision to the team.

40. Change-communication planner

Readiness: Try now

Purpose: Prepare a transparent communication plan for a proposed change.

Create a change-communication plan for [change]. Identify affected groups, what each needs to understand, likely questions, channels, timing, feedback mechanisms, and what leadership has not yet decided. Avoid manufactured certainty.

41. AI practice teach-back

Readiness: Try now

Purpose: Move an advanced individual from personal skill to team leadership.

I can already perform [AI-enabled task]. Help me turn it into a team practice. Create a demonstration, learner exercise, reusable instructions, quality standard, privacy boundary, peer-review step, and a 30-day adoption measure.

42. Learning and adoption pulse

Readiness: Plan with leadership

Purpose: Learn where teams need support without ranking people publicly.

Design a short, psychologically safe adoption pulse that asks what people have tried, what helped, what blocked them, what they want to learn, and what support they need. Do not ask employees to disclose sensitive work or publicly rank their capability.

Sales, marketing, and growth

43. Newsletter draft

Readiness: Try now

Purpose: Turn an approved calendar or topic list into a first draft.

Using this approved calendar and topic list, draft a concise newsletter for [audience]. Include a clear opening, useful highlights, dates requiring attention, and a warm close. Do not invent event details or resident stories.

44. Tour preparation

Readiness: Use approved information

Purpose: Prepare relevant questions and talking points from information a prospect has voluntarily provided.

Using only the approved inquiry information, prepare tour questions and talking points that address the family's stated priorities. Do not infer health, finances, or personal circumstances. Include questions that allow the family to correct our understanding.

45. Content repurposing

Readiness: Try now

Purpose: Convert one approved source into several channel-appropriate drafts.

Turn this approved source into: an executive summary, employee email, social post, and short presentation outline. Preserve the facts, adapt the language to each audience, and identify any claims that require verification.

46. Competitive-intelligence brief

Readiness: Try now

Purpose: Summarize public information with sources and dates.

Using current public sources, prepare a competitive-intelligence brief on [topic]. Cite every material claim, distinguish company statements from independent evidence, record publication dates, and identify what remains unknown.

47. CRM learning summary

Readiness: Use approved information

Purpose: Identify recurring questions, friction, and opportunities from governed CRM information.

Using this approved de-identified CRM export, summarize recurring questions, objections, response delays, and possible process improvements. Show the evidence behind each pattern and do not infer protected or sensitive characteristics.

48. Resident and family preference framework

Readiness: Plan with leadership

Purpose: Define how hospitality preferences could be captured and used responsibly.

Help design a framework for capturing and using resident and family hospitality preferences. Define consent, approved data, ownership, access, correction, retention, and appropriate uses. Separate service personalization from clinical information.

Technology, data, and governance

49. Vendor proposal comparison

Readiness: Use approved information

Purpose: Compare scope, price, dependencies, security, and risk without selecting the vendor automatically.

Compare these approved proposals across scope, assumptions, exclusions, implementation responsibilities, pricing, data access, security commitments, support, and termination. Cite the source section and prepare questions for procurement, IT, legal, and the business owner.

50. Agent blueprint

Readiness: Try now

Purpose: Design an agent before granting it tools or data.

Help me create an agent blueprint for [job]. Define purpose, users, inputs, instructions, knowledge, tools, permissions, triggers, outputs, human review, tests, failure conditions, logging, and owner. Start with a manual version that uses no connectors.

51. Data-readiness assessment

Readiness: Plan with leadership

Purpose: Determine whether a use case has trustworthy, governed inputs.

For this proposed use case, identify required data, system of record, owner, quality checks, update frequency, access rules, retention, provenance, and known gaps. Conclude with the smallest test possible using public, synthetic, or approved data.

52. Administrator request outline

Readiness: Plan with leadership

Purpose: Help a participant explain a desired capability without demanding that controls be removed.

Help me prepare for a conversation with our administrator about [capability]. Organize my notes around the business purpose, users, minimum data needed, read/write permissions, safeguards, human approval, auditability, pilot scope, and how access could be revoked. Do not assume the request should be approved.

53. AI-use boundary guide

Readiness: Plan with leadership

Purpose: Convert organizational policy into practical examples.

Using only this approved AI policy, create practical examples of work that is allowed, requires approval, or is prohibited. Cite the policy section, mark ambiguities for leadership review, and do not create new rules.

54. Internal FAQ skill

Readiness: Use approved information

Purpose: Answer repeat questions from authoritative internal sources.

Create a reusable FAQ skill using these approved source documents. For every answer, cite the source, state when the information was last updated, identify ambiguity, and route exceptions to the responsible team. Never answer beyond the sources.

55. Agent evaluation plan

Readiness: Try now

Purpose: Give advanced builders a disciplined way to test reliability and teach others.

Create an evaluation plan for this agent. Include representative tasks, difficult edge cases, prohibited requests, source-grounding checks, accuracy criteria, human-review thresholds, failure logging, and a teach-back exercise for future users.

56. Shared best-practice library

Readiness: Plan with leadership

Purpose: Turn individual discoveries into reviewed team knowledge.

Design a lightweight team library for prompts, skills, agent blueprints, and lessons learned. Define submission fields, owner, review criteria, versioning, privacy checks, retirement rules, search tags, and how contributors receive feedback.

Finish the exercise

Before you stop, ask your AI system to help you save five things:

1. **The useful output** you created.
2. **The prompt or skill** that produced it.
3. **The approved context** another person would need.
4. **The quality and safety checks** a teammate should apply.
5. **The next step** from personal practice to a shared, leadership-approved workflow.

Save the result as Markdown, DOCX, or PDF—whichever format is easiest for you and your team to review and reuse.