

01:08 - 01:22

Lucas McCurdy

Welcome to Bridge the Gap podcast, the senior Living podcast with Josh and Lucas here in this gigantic convention center at LeadingAge Boston. We've got great guests on today. We want to welcome Nate and Tiffany from Wipfli. Welcome to the show.

01:22 - 01:23

Tiffany Karlin & Nate Sundheimer

Thanks. Thanks for having us. Thanks for having us

01:23 - 02:04

Lucas McCurdy

Well, you know, I talked about this earlier, and if we audited all of our shows from 2025, I guarantee about 99% of the time the topic of technology and their, therefore, AI is in the conversation. Everyone is talking about this, for obvious reasons, but not a lot of people know how I can truly be used and impact me as a leader.

And we've got some great guests on today who are going to talk about that. And so, Tiffany, what's the strategy behind how you're thinking about AI?

02:04 - 02:29

Tiffany Karlin

So at our firm, we have an organizational performance team in addition to a data analytics team, of data analytics work where Nate sits on, and we found that the combination between the two creates this idea of an AI empowered leader. And really, we're well, we feel and we're working with our senior living clients on is that AI and AI tools or specific technologies don't even start with AI literacy.

It actually starts with the mindset, right? The mindset of the leader. We did some polling of our clients. 28% of all of our I.T leaders are saying that transformation is our top priority. Right. You're hearing that I'm sure around this conference is all hearing that 91% of companies point to non-technical challenges, which means it's corporate culture, right? How do we how do we change management before we even start with AI with it in and AI and that whole conversation.

And then 19% of executives say they feel comfortable in leading AI driven transformation. And only 19%. So while it's a buzzword, that's a really small amount of people that are ready to lead this transformation. What we found is that AI is two different mindsets, right? You have AI tools and processes like what we're looking at, what is I mean, and then the people how do we upskill the current people of today and, and in our organization.

And then how do we hire AI talent? And I'll give you an example. We have one of our senior living clients. And they they said, you know, we're not we're you know, we're not we're not even in this I get and and and then and this was a chief human resources officer and they're sitting in a group of people with their HR folks.

And the the person next on the what what actually, you know, our recruiting person uses AI to weed out the candidate applications. Oh, okay. And then and then another person's like, actually, you know, I use AI in crafting what our job description is. And so what we've found is and this is our direct point is, is even at the leadership level, we don't know what our current employees are even doing.

We have no processes behind it. We have no policies and procedures behind it. And yet everyone is off like the wild, wild West doing whatever they want to do. And so it's kind of regrouping, getting everyone back to having big discussions around what does AI and power leadership look like in this transformation of adoption of.

04:42 - 04:55

Lucas McCurdy

Well, that's a great segue. You've given a great foundation on this big, big topic that needs to be addressed and you guys are leading that charge. So what exactly does an AI powered leader look like?

04:55 - 07:07

Tiffany Karlin

We break this down into these six different key areas that we look at. And again, that's kind of on how do we change the way we're adopting AI in addition to how we change our people. And those six are, number one, the AI empowered leadership with data driven self-awareness. So in our firm, our organizational performance, we focus on peak studies like that to understand and adapt to AI.

Number two. What is your AI Literacy foundation? A lot of what Nate and our team is doing, working with our clients to understand as a big word, what is it you actually believe that to be in your organization and how are you using it? Number three, as I mentioned, change leadership, change management. Number four, I love this one. Delegating with purpose.

So we have the four the who, the what when and the why. So the four W's we really like to focus on what what is the work we're delegating the who who are we delegating that to and being the who is in this change is is it a human who or is it an AI who right going back to what they are doing?

Well, I'm using the AI to draft a and, you know, job posting well is no longer do we need to spend a whole bunch of time working on that. That was loved by AI. So I think that's really profound to know. On the Who concept. Number five, coaching for growth. So it's our responsibility to really as leaders.

How are we again upskilling our people. How do we prepare them. And frankly, as much as we don't want to say that AI is going to assume some job responsibility, of course it acts, right. We

have we've talk about it in senior living all the time. There's the lack of resources and human capital. We need to make up for that with technology.

We need to upskill the current talent to be able to know what is it you are going to do in your role with technology replacing certain aspects of your role? It's our responsibility as leaders to upskill their talent so that they're ready versus it being a job that no longer exists anyway.

07:07 - 07:27

Lucas McCurdy

This is quite a process, Nate. I mean, you know, there's it can be kind of cumbersome and a little bit complicated. And we're so glad that we have y'all on to walk us through and make it a little bit simpler. How does this process even start?

07:27 - 09:05

Nate Sundheimer

Great question. And, you know, you really hit the nail on the head saying it's cumbersome and it's a lot to take in. And, you know, as an analogy, when I think about the various organizations that are, you know, taking on this endeavor and trying to navigate, this world of AI, I kind of like to think of them as a vessel, you know, in the middle of the sea, you know, it's deep, it's expansive, it's massive. And a lot of us are just we're just floating, you know, we're here, we're seeing, you know, you can go a thousand different directions.

And so as a leader, as that captain of the vessel, you know, we really break it down to three DS. And that's really for the AI power leadership. And so the first thing is, is that direction, you know, it's the strategic and the tactical mindset that you need to have to figure out where do you need to go.

All right. So our strategy is okay. You know, we're going to find our North Star. You know you know that's our short-term goal or our long-term goal. We just need to find where that North Star is and orient our ship that way. And then tactically, we have to figure out how we're going to ultimately, you know, move the boat forward, to ultimately, you know, reach that destination.

So, you know, when you think about that mindset, you know, when you think about, you know, the variety of directions, you know, you're ultimately thinking about, you know, what where what workflows or what things in my organization can I actually help execute? And, you know, am I actually going to change or improve what I'm trying to do?

And ultimately, you just have to break it down at that super baseline level. But beyond the direction, you know, that's when you're really focusing on the design. So, you know, whether it's on workflows or your processes, you know, that's kind of how you're constructing the vessel. And then ultimately, you know, the things that are propelling you to where you need to be are the technology. And the people that Tiffany had mentioned.

09:05 - 09:18

Josh Crisp

Well, what a great breakdown. So we're leaning in. Our audience is leaning in. You've tickled our ears here a little bit. But Tiffany, what does it really mean to be an empowered leader?

09:18 - 12:18

Tiffany Karlin

I mentioned earlier the idea of self-awareness. Right. And some awareness starts with not just the leadership. But then of course, it's also with the team of people that you're surrounding yourself. You're building this bench strength of who's going to be involved in this change management. And again, we focus on that and work with our clients on high EQ, then coach them through change management.

And I'll give you an example of what this self-awareness looks like from the beginning. And I break this down into even with our own teams, at which we, we are also performing these evaluation tests on how to figure out our own change management. Because technology is transforming the way an accounting firm and advisory firm looks.

And so for me, when it comes with my P.I., I'm somebody who loves innovation, I love change, I want to get out there and make it happen, but I frankly want to be in control of that change. Right? I know that I want to be in control. I want to rally, move forward, but also very methodical about it and make sure that, like, we have all this buy in and there's there's a lot of execution around it.

Whereas I might have a colleague like me who's very focused on precision, very focus on I first want to know every way this is going to unfold before you do that, or I'm going to be completely adverse to that change. And so I think a big part of being an AI and power leader starts with, do we know thyself and how we're going to respond to change?

And how do we then make the message so that the rest of our team can also hear, act and respond proactively to that change? With that, then, is delegating differently again how you know, what do we want to do to make sure that we're aligning the resources that we have with all the people in the team? And that doesn't necessarily mean and that will go into some of these to that, it's just your chief technology officer, AI and change management is everybody.

It's everybody's responsibility to have a seat at the table, change leadership, you know, planning, implementing, reinforcing the change. Right. Constantly saying, constantly having open communication and messaging years, these milestones of things that we're doing progressively that are making sure that the change is heard and understood. The more you can tell a story as to this is how your life as a nurse can change and the ability for you to take care of the residents differently.

If we do. This is a totally different beginning for somebody. Rather than saying we're just going to go after this, right? That's it's just it's a different story. And then coaching, right, being able to really continuously enforce and coach our people on AI adoption, on why our organization is

heading in the right direction. And those all encompass really the buy in and the organizational growth, and on for the future.

12:18 - 12:43

Lucas McCurdy

That could be another complicated point of this. I mean, self-aware leaders, it's easier said than done, but it's so important. Those points, Tiffany, you made are very, very poignant. I appreciate that. So, Nate, there's a little bit of push and pull here. There's kind of an offense versus defense. Can you help us define some of those terms when we're talking about AI?

12:43 - 15:09

Nate Sundheimer

You know, when we think about if I, you know, everything here at this conference, everything that's in the market, everything that's in, development has some level layered in or embedded into the, into that technology. And so, you know, in a way, it's a bit of an arms race for solutions to differentiate and, you know, and drive competitive advantage for the organizations that are really looking at these technologies.

And so Tiffany and I were talking about this a couple of weeks ago, and I'm a big sports fan, and I love sports analogies. And, you know, I said, you know, you know, this is really just a game of field position. It's a game of balancing offense and defense. And so ultimately, like your strategy as far as how you're balancing that depends on your organization's goals.

So it's your ability to adopt technology, your ability to comprehend, and really, you know, bring that technology in effectively into your organization. It's also focusing on your market competition, like how you can differentiate some of your peers or if your peers are, you know, making some strides that are, you know, where they are differentiating? You know, you don't want to fall behind, you don't necessarily want to be a laggard, in that sense.

And then ultimately, your resident's needs. So how can you constantly, you know, improve their outcomes, improve their experience, and so on and so forth? And so, you know, foundationally and, you know, they say defense wins championships. You know, that's your compliance. That's your safety. That's your operational efficiency. So think of your EHR, ERP, and medication management. You know, it's basically those core essentials to operate and, you know, promote that quality of care.

But on the offensive side, you know, these are things that are just like taking things beyond the norm. Like, you know, you're trying to run up the score, you're trying to score some points. You know, you're focusing on that personalized care, you know, enhancing the overall experience for the residents in your organization. And, you know, those are the things, you know, from a consumerism standpoint.

Those are things that are really differentiating yourself in a, in a competitive market. So enhancing those experiences and ultimately on that consumerism angle, that's where you're

attracting more residents, you know, by providing a lot of those innovative services. So, you know, when you think about it, okay, how are we going to balance this offense and defense? You know, I really just depend on those short and long-term goals.

And so, like I said on the defensive side, so it's operational challenges. It's, you know, things that you're working on to overcome regulatory hurdles, offenses. Hey, like I'm thinking I'm going to expand, I'm going to innovate, I'm going to find a way to break the norm. And so ultimately, you know, that's how I think about that in terms of sports.

15:09 - 15:32

Josh Crisp

Well, you've definitely convinced us. So we know, we we know we need to do this. You've even given us the coach's motivational pep talk here. But, you know, I mean, this is going to require change. You know, that's not always the most comfortable thing for anyone, really. Right. The change of word sometimes even brings about some apprehension. So where do we begin? You know, to prepare for the change, like, where's the starting point?

15:32 - 18:42

Nate Sundheimer

The approach that I always recommend is the three M's. It is methodical, it is meticulous, and it is modular. You want to start small and continue to grow outward. But when you think about it, you know, where to start, you know, the first question you have to ask yourself is what needs to be done differently or what can be done more efficiently?

Why am I doing the same process? There's gotta be a different way. And so you think about what can be done differently. Once you've figured out what that is, you know, you have to really understand why you're making the change. You're just making the change for the sake of it. You know, is it going to improve the amount of time that you're spending on an activity?

Does it improve the accuracy? Is it, you know, going to make life easier? Is it just that, but not in this thing, that you just dread and you just want to get it over with and never look at it again until it pops up later? So you know, many reasons why you could make the change. But then when you do that, that's when you really look at making that, you know, that ROI analysis and benefit analysis.

You know what? Like, you know, everything has to be rooted in some sort of qualitative or quantitative ROI. And once you have that, you know, okay, we know what we're going to go, but how are we going to change? And then when are we going to change? I think that's always one big one. Everyone's like, okay, yeah, like in theory like this.

There are a number of ways in which how we can approach this. But everyone's like, hey, like, we need to do this now. Or like, you don't want to punt it too far down and then, you know, as another branch to that when it's also fair. And a lot of the for the controllers and the CFOs is when are we going to expect results?

When are we going to expect some level of ROI. So you know, ultimately that's kind of a way to think through that process. But when you think about organizations in senior living, you know, generally speaking, many organizations are still pretty early in their technology and their AI adoption. But when you think about, you know, that theoretical sigmoid curve of how, you know, organizations are bringing on these new technologies, senior living is really falling behind in a lot of ways, even though, you know, there is effort.

You see a lot of great technologies here. But, you know, it's not quite where it needs to be quite yet. So, I mean, there's a number of popular use cases that are really active right now and things that, you know, other organizations can pursue. And you typically, you know, I especially what we're seeing here is being used in targeted high volume, finance processes.

So whether it's invoice processing for an accounts of payables, it's like reading, coding, doing that automatic routing, payroll and scheduling analytics is another big one. Forecasting and budgeting. So you're seeing a lot of that in the space as well. But ultimately, you know, tying it back to, you know, the people side. You know, the question is, how do we get started?

And one is the mindset that Tiffany mentioned. The other part is the readiness, and so you can have that mindset, you can have that AI-first mindset. But you know, a lot of organizations that we run into, they don't have the readiness side of the equation quite ready. So whether that's the data quality, whether, you know, their systems are still fragmented, they're still exporting and doing some manual manipulation. And one of their systems, they may be having limited it bandwidth. But ultimately those are the things that need to be fixed.

18:42 - 21:15

Lucas McCurdy

As we round out our conversation here about the AI empowered leader, you know, there's a bit of a process here. And, there's some culture change. And, in any organization, it really is driven by the people and getting the right people in the right places to impact this change. Walk us through some of your thoughts on that.

19:11 - 19:35

Nate Sundheimer

Sure. I mean, when it comes to leadership, and you're thinking about this specific topic, you know, you see where the industry is going. But on the other side, it's that self-awareness and really understanding where you have those organizational weaknesses and gaps. And so it's how do you find the right people, or how do you find the right applications?

That will take your organization where you want and need it to be. And so when you're thinking about delegating, you know, you always want to think about, you know, do you have the right people? You may have the right people. You may not have the right people. Ultimately, everyone who's going to be touching the solution needs to have a voice because they all have wildly different experiences.

But generally speaking, you may or may not have all the people that you need to successfully bring that technology to the fold. And so you have to think about, do you need partners? Do you need new personnel, whatever that may be, whether that's on the integration front, the implementation for ongoing support, new people in general, you never know.

But then, when you think about beyond just the people side, you know, you have to think about how you're prioritizing. Not that AI pipeline per se. So, you know, you know what? What needs to be tackled now, what needs to be tackled later, what aligns with your short-term goals, what aligns with your long-term goals? And you have to figure out how that prioritization is being driven, you know, is it being driven internally?

Is it, you know, similar to Tiffany's example, where, you know, the CHRO had no idea that, you know, someone else in the organization was already using some of the technology. So is it being internally driven? Is it from the peers, you know, more so from a competitive side, or, you know, from a friend or friend side? Oh, you're using that technology.

Awesome. And then also, you know, here being a LeadingAge nationally, you know, tons of vendors that are also teaching you where you need to go. So, like, how are you, you know, being proactive versus reactive in terms of how you are? You know, ultimately pursuing these different solutions. Wow. Well, Lucas, what a masterclass on this topic.

21:15 - 21:48

Josh Crisp

Wow. Well, Lucas, what a masterclass on this topic. You know, our listeners are probably going to want to put this one on repeat. That's a lot of information to take in. You guys gave us some great strategy and takeaways. And it's really cool that you're investing so much not only to equip your team, but you're equipping our industry. And thanks for taking a leadership role in that. It's such an honor to have Tiffany and Nate with us, and a great treat for our audience. Great episode. Thank you both for your time today. We really appreciate it.

21:48 - 21:54

Lucas McCurdy

Absolutely. Thanks, guys. And to our listeners, you're going to want to download this content and so much more. You can do that at [btgvoice.com](http://btgvoice.com). Connect with us on LinkedIn. We'd like to hear your thoughts about this topic. And thanks for listening to another great episode of Bridge the Gap.

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