3 things to get right before investing in AI

Before investing in AI, learn how home care agencies can define the right business problem, prepare reliable data, and establish strong governance and security.

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Home care leaders are struggling to determine which AI solutions are worth implementing, and which will create more complexity than value.

Every week seems to bring a new platform, assistant, automation tool, or AI-powered feature that promises to solve recruiting challenges, improve candidate engagement, reduce turnover, or increase operational efficiency. Many of these solutions can offer real value, but successful adoption isn't as simple as flipping a switch.

The agencies seeing the strongest results are taking the time to build the right foundation before introducing new technology. By seeing AI as a tool, agencies realize its effectiveness depends on the systems, processes, and people supporting it.

Before evaluating another vendor or launching another pilot program, home care organizations should focus on three areas that can make the difference between an AI investment that delivers meaningful results and one that falls short.

1. Start with a business problem, not an AI tool

One of the most common mistakes organizations make is having a backwards approach to AI. Instead of identifying a challenge they want to solve, they start with technology and try to find a use for it. That approach often leads to disappointment because the tool, rather than the business need, drives the decision.

The strongest AI initiatives begin with a clearly defined operational problem. Your recruiters may be struggling to keep up with application volume, hiring managers may be losing qualified candidates because follow-up takes too long, or leaders may have limited visibility into workforce trends that could help reduce early turnover. Once the problem is clear, the technology can be evaluated against the outcome the organization needs to achieve.

Leading with the problem also makes it easier to compare potential solutions based on measurable business outcomes rather than a polished product demonstration.

For home care providers, the best starting points are often repetitive, time-consuming hiring processes. Candidate screening, interview coordination, application follow-up, onboarding communications, and other recruiting workflows are high-volume and repeatable. They can also create bottlenecks that cause strong candidates to lose interest, which makes them practical candidates for thoughtful automation.

These processes are generally a better fit for automation than highly nuanced work that depends on context, relationships, and human judgment.

That doesn't mean removing people from the process. In many cases, AI delivers the most value when it reduces administrative friction and gives employees more time for work that requires a human touch. Recruiting teams can spend more time talking with candidates, hiring managers can focus on evaluating fit and building relationships, and leaders can devote more attention to onboarding, retention, and caregiver support.

2. Make sure your data is ready

When AI doesn't deliver the expected results, organizations may assume the technology isn't sophisticated enough. More often, the underlying issue is the data.

AI systems can only work with the information they're given, and many home care organizations have years of incomplete, inconsistent, or disconnected data spread across multiple platforms.

Important information may live in applicant tracking systems, payroll systems, recruiting platforms, spreadsheets, interview notes, and employee records. The challenge is making sure the data an organization already has is accurate, accessible, and connected.

Hiring offers a clear example. At first glance, identifying a qualified caregiver may seem straightforward, but experienced recruiters know that each decision depends on details that aren't always documented consistently. Availability, transportation, geography, credentials, experience, communication preferences, and prior interview feedback can all influence whether a candidate is the right fit.

If that information isn't clean and reliable, even an advanced AI solution will struggle to produce useful results. The same principle applies to candidate screening, interviewing, onboarding, retention analysis, and broader workforce support.

Before evaluating an AI platform, leaders should take an honest look at the quality of the information moving through their systems and consider a few practical questions:

- Is our data current and accurate?
- Are critical workflows documented consistently?
- Do systems share information effectively?
- Can we easily access the information needed to make decisions?
- Are employees entering information in standardized ways?

Improving data quality and documenting processes may not feel like the most exciting part of an AI initiative, but this work often determines whether the investment creates measurable value or ongoing frustration. Clean, consistent processes give AI a stronger foundation.

3. Build in governance and security from the start

One of the biggest risks surrounding AI is operational, especially when employees begin using readily available tools before clear policies and safeguards are in place.

As AI tools become easier to access, employees will naturally experiment with them. A manager may use a chatbot to draft communications, a recruiter may use AI to summarize notes, or an employee may upload information without fully understanding how the tool stores, shares, or uses that data. Clear governance helps people use these tools responsibly without leaving them to navigate the risks on their own.

Home care organizations manage sensitive workforce and client information every day. Before adopting an AI solution, leaders should understand how data moves through the system, where it is stored, who can access it, and what safeguards the vendor has in place.

Vendor conversations should address practical questions such as:

- Who owns the data?
- Is customer data used to train models?
- What happens to data if the contract ends?
- How is information secured?
- What reporting and audit capabilities exist?
- What privacy protections are included?

Human oversight is just as important as technical safeguards, which is why strong AI strategies support it.

AI can identify patterns, accelerate workflows, and surface recommendations, but people should remain responsible for critical decisions. Human review preserves accountability, reduces risk, and brings real-world context to decisions that technology may not fully understand.

Transparency also plays an important role in building trust. Whether AI supports recruiting, employee communications, or operational workflows, employees should understand how the technology is being used and where people remain involved in reviewing decisions. Clear expectations make responsible adoption easier for everyone.

Focus on the foundation first

AI can help home care organizations operate more efficiently, strengthen workforce support, and create better experiences for caregivers and office staff. Lasting results, however, come from choosing the right problems to solve, maintaining reliable data, and putting thoughtful governance practices in place before adoption expands.

The agencies that benefit most from AI will be the ones that take a measured approach, build a strong foundation, and use technology to strengthen the human side of home care rather than replace it.

Curious how AI can impact your agency? Request a demo to see AI done right.

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