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SAMPLE · FICTIONAL CLIENT

AI OPPORTUNITY AUDIT

The ranked, priced roadmap.

Where AI saves real hours or wins real work in this business: every opportunity with a dollar estimate, one first move, and the math shown.

PREPARED FOR

Bluestem Property Management LLC

Kansas City, MO · 410 doors · August 2026 · A fictional company. Every figure in this sample is invented for illustration.

01 Executive summary

BUSINESS CONTEXT

Bluestem manages 410 doors with a team of six and wants to reach 600 doors without adding admin headcount.

MAIN DIAGNOSIS

- **Maintenance intake runs through one person.** Calls, texts and emails all land on the coordinator, who re-types every request.
- **Renewals start when a resident asks.** Units sit vacant that never needed to.
- **Owner statements eat the first week of every month.** Assembled by hand from three systems.
- **The numbers live in five places**: Buildium, QuickBooks, spreadsheets, email and one person's memory.

ESTIMATED ANNUAL VALUE, RECOMMENDED PORTFOLIO

$52,000/yr

Staff time at loaded cost, plus one named rent effect, across the four recommended workflows. The appendix shows every line of this figure.

RECOMMENDED FIRST BET

WHERE TO START

Maintenance Intake & Triage Agent: from resident text to scheduled vendor

ESTIMATED STAFF TIME BACK

~44 hrs / month

FIXED BUILD FEE

$3,500–$5,000

SOFTWARE RUNNING COST

$75–$150 / mo

Sample figures for illustration. In a real audit, every number is built from your data and priced before work starts.

⚠ CONFIRM IN DISCOVERY

Risks to call out

01

Data hygiene. Buildium unit and lease records need a cleanup pass before anything automates against them.

02

Key-person load. The maintenance coordinator is both the biggest gain and the biggest rollout risk. Sequence around her calendar.

03

Platform decision pending. An AppFolio switch is under discussion. Builds target Buildium today and are designed to port.

02 Current state

COMPANY CONTEXT

A residential property manager running 410 doors for ~60 owners on roughly $1.05M a year in management revenue. Six people, one office.

OPERATIONAL PICTURE

- **The coordinator absorbs everything**: maintenance intake, vendor dispatch, resident callbacks.
- **Statement week**. The bookkeeper loses days 1–5 to assembly, then answers owner questions by email all month.
- **Leasing replies lag**. Inquiries answered in hours; applicants have moved on.

Current Stack

7 live · 1 considered

PROPERTY MGMT	Buildium APPFOLIO UNDER EVALUATION*
ACCOUNTING	QuickBooks
PHONE / SMS	RingCentral
EMAIL	Gmail
FILES	Google Drive
DATA MGMT	Spreadsheets
LEAD INTAKE	Website forms · Zillow
AI	None in use today

Top Workflows

10 mapped

01 Maintenance intake & dispatch
02 Rent collection & delinquency
03 Leasing inquiries & showings
04 Applications & screening
05 Move-in / move-out
06 Owner statements & payouts
07 Vendor invoices & payments
08 Lease renewals
09 Inspections & turns
10 Owner onboarding

⚠ CONFIRM IN DISCOVERY

Contradictions & signals

01

Hours are self-reported. Audit week one times the real workflows first.

02

Vacancy math is an assumption. The pilot confirms it with lease data.

03

Platform undecided. AppFolio vs. Buildium changes targets, not the roadmap.

04

Rent varies by class. The $1,350 average hides a $900–$2,100 spread.

SECTION 03 · OPPORTUNITY LANDSCAPE

The ranked roadmap

Eight opportunities ranked by business impact, ease of automation and hours at stake. Estimates come from the client's own inputs. The appendix shows the arithmetic.

ID	OPPORTUNITY	IMPACT	EASE	HOURS/MO	EST. VALUE	STATUS
1	Maintenance Intake & Triage Agent	●●●●●	●●●●●	44 hrs	$1,496/mo	RECOMMENDED
2	Lease-Renewal Pipeline & Delinquency Nudges	●●●●●	●●●●○	22 hrs	$1,198/mo	RECOMMENDED
3	Owner Statement Prep & Q&A Drafts	●●●●○	●●●●○	26 hrs	$988/mo	RECOMMENDED
4	Leasing Inquiry Auto-Response & Showing Scheduler	●●●●○	●●●●●	18 hrs	$612/mo	FOUNDATIONAL
5	Vendor Invoice Matching · work order to ledger	●●●●○	●●●○○	12 hrs	$456/mo	TO BE DETERMINED
6	Move-Out Packet & Deposit Letter Automation	●●●○○	●●●●○	9 hrs	$306/mo	TO BE DETERMINED
7	Listing Copy & Syndication Prep from Unit Data	●●●○○	●●●●●	7 hrs	$238/mo	TO BE DETERMINED
8	Monday Portfolio Briefing · Weekly Digest	●●●○○	●●●○○	10 hrs	$646/mo	RECOMMENDED
	Total mapped exposure			148 hrs	$5,940/mo	8 OPPORTUNITIES

IMPACT How much solving this moves the business toward 600 doors.

EASE How cleanly today's tools handle it. No science projects.

EST. VALUE Staff hours at loaded cost, plus named revenue effects only.

Sample figures for illustration. A real roadmap prices every row from your data, and rows that can't be verified stay off it.

SECTION 03 · OPPORTUNITY LANDSCAPE

One first move per opportunity

Every row on the roadmap comes with a step you can take Monday, before any build is bought. Most cost nothing but an hour.

1 Maintenance Intake & Triage

FIRST MOVE

Point every maintenance channel at one shared inbox and log one week of volume. Count what arrives after 5 p.m.

2 Lease-Renewal Pipeline

FIRST MOVE

Pull every lease ending in the next 120 days into one sheet. Start the three closest conversations this week.

3 Owner Statement Prep

FIRST MOVE

Time the next statement run start to finish. Write down the three slowest steps. Those are the build spec.

4 Leasing Inquiry Response

FIRST MOVE

Turn on an auto-reply with three pre-qualifying questions and a link to book a showing slot.

5 Vendor Invoice Matching

FIRST MOVE

Match last month's vendor invoices against work orders by hand once. Count the mismatches. That's the leak.

6 Move-Out Packet & Deposit Letters

FIRST MOVE

Write the itemized deposit-letter template once, with the statute deadline on it. Reuse it every turn.

7 Listing Copy & Syndication Prep

FIRST MOVE

Build one master unit-data sheet per property: beds, baths, finishes, quirks. Copy writes itself from good data.

8 Monday Portfolio Briefing

FIRST MOVE

List the numbers the owner checks daily and where each one lives. That list is the digest's table of contents.

THE ROADMAP IS YOURS EITHER WAY

Run these yourself, or hire us for the builds that follow. Nothing in this document requires buying anything else from us. It says so here, in the deliverable.

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SAMPLE PREVIEW

Recommended first build

1 OF 8 The full roadmap includes a build page like this for every recommended workflow.

OPPORTUNITY 01

Maintenance intake runs through one person, one channel at a time, and after-hours requests wait in voicemail until morning.

Maintenance Intake & Triage Agent

From resident text to scheduled vendor

Requests arrive by call, text or email. Claude reads each one, pulls the unit and lease record from Buildium, grades urgency against your emergency rules, and drafts the work order with photos attached. Emergencies page the on-call tech immediately. Routine requests queue with a suggested vendor, and the coordinator approves the whole stack in one pass.

ESTIMATED 3-YEAR VALUE

$45,000

Staff-time value at sample figures, minus the build fee and three years of software cost.

BUILD TIME	FIXED FEE	PLATFORM
12–30 h	$3.5–5k	n8n

HOW IT WORKS

1. Resident texts, calls or emails a request
2. Claude reads it, pulls unit & lease data, grades urgency
3. Work order drafted in Buildium, photos attached
4. Emergencies page on-call; routine gets a vendor draft
5. Coordinator reviews the queue, approves in one pass

BUILT WITH n8n · Claude · Buildium · Twilio SMS · Gmail

WHAT YOU GET

- ✓ **Ends the re-typing.** Every request becomes a structured work order, whatever channel it came in on.
- ✓ **First response in minutes, any hour.** The 2 a.m. water heater gets paged, not voicemailed.
- ✓ May give the coordinator back **~44 hours per month**, an estimate the pilot will measure.
- ✓ **Nothing auto-sends to a vendor.** A person approves every dispatch. That guardrail is in the build spec.

OFF-THE-SHELF OPTION **Property Meld** | ALTERNATIVE **Latchel** · If a subscription beats a build, the roadmap says so.

SAMPLE PREVIEW

SECTION 04 · RECOMMENDED BUILDS

Revenue & occupancy

RENT / OCCUPANCY OPPORTUNITY

OPPORTUNITY 02

Renewals start when a resident asks. Rent reminders depend on who's at a desk that day.

Lease-Renewal Pipeline & Delinquency Nudges

Renewals start at 90 days, not at move-out

n8n watches lease end dates. At 90 days, Claude drafts a renewal offer from the owner's instructions and your comps sheet; the property manager reviews and sends. Non-renewals trigger make-ready and listing tasks the same day. On the rent side, reminders go out on days 2, 5 and 10 with a payment link, and the escalation list lands on the PM's desk, not in her head.

ESTIMATED 3-YEAR VALUE

$38,000

Staff time plus one named rent effect (an avoided vacant month per quarter), minus fees and software.

BUILD TIME	FIXED FEE	PLATFORM
10–24 h	$2.5–4k	n8n

HOW IT WORKS

1. n8n watches lease end dates: 90 / 60 / 30
2. Claude drafts the renewal offer from owner instructions & comps
3. PM reviews, adjusts, sends
4. Non-renewals trigger make-ready & listing tasks same day
5. Rent nudges day 2 / 5 / 10; escalations to the PM

BUILT WITH: n8n · Claude · Buildium · Twilio SMS · Gmail · Google Sheets

WHAT YOU GET

- ✓ **Every renewal starts at 90 days** on 100% of leases. No exceptions, no memory required.
- ✓ The rent-effect estimate rests on **one assumption, named in the appendix**, and the pilot measures it before anyone banks it.
- ✓ **Rent conversations get consistent**: same schedule, same tone, every resident.
- ✓ **A person sends every renewal offer.** Claude drafts; your PM decides.

OFF-THE-SHELF OPTION **Buildium's built-in reminders** | ALTERNATIVE **RentRedi** · We recommend the cheapest thing that works, including the one you already pay for.

The stack, in layers

All eight workflows run on tools you own: n8n as the orchestration layer, Claude reading and drafting, and Buildium and QuickBooks staying the systems of record.

No rip-and-replace. Nothing new goes in the stack without a reason attached to a number.

01	**Systems of record** Your data sources & action targets	Buildium · AppFolio* · QuickBooks · RingCentral · Google Drive · Website forms
02	**Automation layer** Orchestration, the spine	n8n
03	**AI layer** Reading, triage, drafting & extraction	Claude
04	**Communication layer** Resident, owner & internal delivery	Twilio SMS · Gmail · RingCentral
05	**Reporting & visibility** Always know what needs attention	Google Sheets · Weekly digest · Monday briefing

* **AppFolio is a platform the client is evaluating, not one they own.** Builds target Buildium today and are designed to port if the switch happens. Tool choices are finalized in discovery, and every guardrail (who approves what, what AI may see, spend limits on tokens) is written into each build spec.

SAMPLE PREVIEW

06 Business case

ID	RECOMMENDED WORKFLOW	HOURS/MO	EST. VALUE/MO	FIXED BUILD FEE	SOFTWARE/MO
1	Maintenance Intake & Triage Agent	44	$1,496	$3,500–5,000	$75–150
2	Lease-Renewal Pipeline & Delinquency Nudges	22	$1,198	$2,500–4,000	$25–50
3	Owner Statement Prep & Q&A Drafts	26	$988	$2,500–4,000	$25–50
8	Monday Portfolio Briefing · Weekly Digest	10	$646	$2,500–3,500	$25–50
	Recommended portfolio	102	$4,328	$11,000–16,500	$150–300

ESTIMATED ANNUAL VALUE, RECOMMENDED PORTFOLIO

$52,000/yr

$4,328/mo × 12. Staff time valued at loaded cost (what these hours already cost you) plus one named rent effect. Hours don't leave payroll; they move to work that fills doors.

AT THESE SAMPLE FIGURES

FEES, ALL FOUR BUILDS

$11,000–$16,500 one-time

SOFTWARE, ALL-IN

$150–$300 / mo

EVERY FEE

fixed in writing, before work starts

Illustrative arithmetic, not a promise. Each workflow stands alone. Buy one, four, or none.

HOW TO READ THESE NUMBERS

Every figure on this page is an estimate assembled from the client's own inputs: their hours, their wages, their rents. We count staff time at loaded cost and revenue effects with a named mechanism. We don't use vendor case-study percentages, industry multipliers, or anything we can't trace to this business's data. Chapter 08 shows the arithmetic line by line. If a number can't survive that page, it doesn't appear on this one.

07 Roadmap & pilot

Eight workflows, one program, three phases: each phase paid for separately, each proving itself before the next starts.

PHASE 01 START HERE

First Proof

OPPORTUNITIES 1 · 4

1 Maintenance Intake & Triage Agent

4 Leasing Inquiry Auto-Response & Scheduler

PHASE FEES	$6,000–$8,000
EST. VALUE	$2,108 / mo
LIVE ON REAL WORK	inside 30 days

PHASE 02

Money Flows

OPPORTUNITIES 2 · 3

2 Lease-Renewal Pipeline & Delinquency Nudges

3 Owner Statement Prep & Q&A Drafts

PHASE FEES	$5,000–$8,000
EST. VALUE	$2,186 / mo
STARTS	after Phase 01 measures

PHASE 03

Visibility

OPPORTUNITIES 8 · 5 · 6 · 7

8 Monday Portfolio Briefing

5 Vendor Invoice Matching

6 Move-Out Packets & Deposit Letters

7 Listing Copy & Syndication Prep

The reporting-and-cleanup layer, scoped and priced after Phases 01–02 report, using measured numbers instead of these estimates.

DEFINITION OF DONE · SUCCESS METRICS, MEASURED NOT ASSUMED

- ✓ **First response under 2 minutes** on >95% of maintenance requests, any hour.
- ✓ **Zero requests lost between channels.** Every call, text and email becomes a logged work order.
- ✓ **The coordinator's timed week** shows the hours actually moved, measured against week one's baseline.
- ✓ **Renewal conversations start at 90 days** on 100% of expiring leases.
- ✓ **Owner statements drafted by day 3.** Bookkeeper reviews instead of assembles.
- ✓ **Every metric reports monthly** in the Monday briefing, next to what it was before.

Phase fees are sample figures shown as bundles; each workflow is also available standalone. A real roadmap fixes each fee in writing before its build starts.

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SAMPLE PREVIEW

08 Calculation appendix

Every dollar in this document, rebuilt line by line. If a figure isn't on this page, it isn't in the roadmap.

RATES USED · THE CLIENT'S OWN NUMBERS

COORDINATOR / PM, LOADED	BOOKKEEPER, LOADED	OWNER'S HOUR	AVERAGE RENT
$34 / hr	**$38 / hr**	**$85 / hr**	**$1,350 / mo**
$26 wage + ~30% taxes & benefits	$29 wage + ~30% taxes & benefits	The client's own valuation, on record	Portfolio average from the rent roll

LINE	ARITHMETIC	VALUE/MO	SOURCE
1 · Maintenance triage	44 hrs × $34	**$1,496**	CLIENT INTERVIEW timed in audit week 1
2 · Renewals: staff time	22 hrs × $34 = $748	**$748**	CLIENT INTERVIEW
2 · Renewals: rent effect	1 avoided vacant month per quarter × $1,350 ÷ 3	**$450**	ASSUMPTION validated in pilot before it counts
3 · Owner statements	26 hrs × $38	**$988**	CLIENT INTERVIEW ~60 statements/mo
8 · Monday briefing	6 owner hrs × $85 + 4 hrs × $34	**$646**	CLIENT INTERVIEW
Recommended portfolio	sum of the above	**$4,328**	× 12 = **$51,936 ≈ $52,000/yr**
B1 · 3-yr value, build 1	$1,496 × 36 − $4,250 avg fee − $112/mo × 36	**≈ $45,500**	rounded down to $45,000 on page 6
B2 · 3-yr value, build 2	$1,198 × 36 − $3,250 avg fee − $38/mo × 36	**≈ $38,500**	rounded down to $38,000 on page 7

WHAT WE COUNT, AND WHAT WE DON'T

Counted: staff hours at loaded cost, and revenue with a mechanism we can name and test. Not counted: vendor case-study percentages, "industry average" multipliers, morale, or anything that needs a forecast to be true. Hours estimates are the client's own, timed against reality in week one of a real audit, and the roadmap is re-issued if the timing disagrees.

This is a fictional sample: the inputs are invented, so the outputs are too. The method is the product. In a real audit, this page is built from your payroll, your rent roll, and a stopwatch.

SAMPLE · FICTIONAL CLIENT

AFTER THE AUDIT

The audit is step one. Everything after it is your call.

Anything we build comes from your roadmap, priced as a fixed fee before work starts. And the fairness rule from page 5 holds: the roadmap is yours either way.

01	**AI Opportunity Audit**	Two weeks. We document how your work happens today, then hand you a ranked list of 5 to 10 places AI saves real hours or wins real work, each with a dollar estimate and one first move. This document is what it looks like.	$5,000
02	**Implementation**	One workflow from your roadmap, automated end to end, with guardrails written into the spec: who approves what, what AI may see, what it may spend. Every build can carry a Care Plan: maintenance, monitoring, and model updates as tools change, 10 to 15% of the build per year, billed monthly. Optional, cancel anytime.	$2,500–$9,000 fixed, per build
03	**Strategic guidance**	Two standalone seats. Advisory, from $4,000/mo: AI policy, governance, guardrails, and vendor evaluation, about 2 days a month, your team owns execution. Fractional CAIO, from $5,000/mo: we own the AI program, the roadmap, build-vs-buy, and the reporting to leadership.	From $4,000/mo

Book the audit →

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Guiding business to the AI frontier.

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