

1. Introduction and Objective

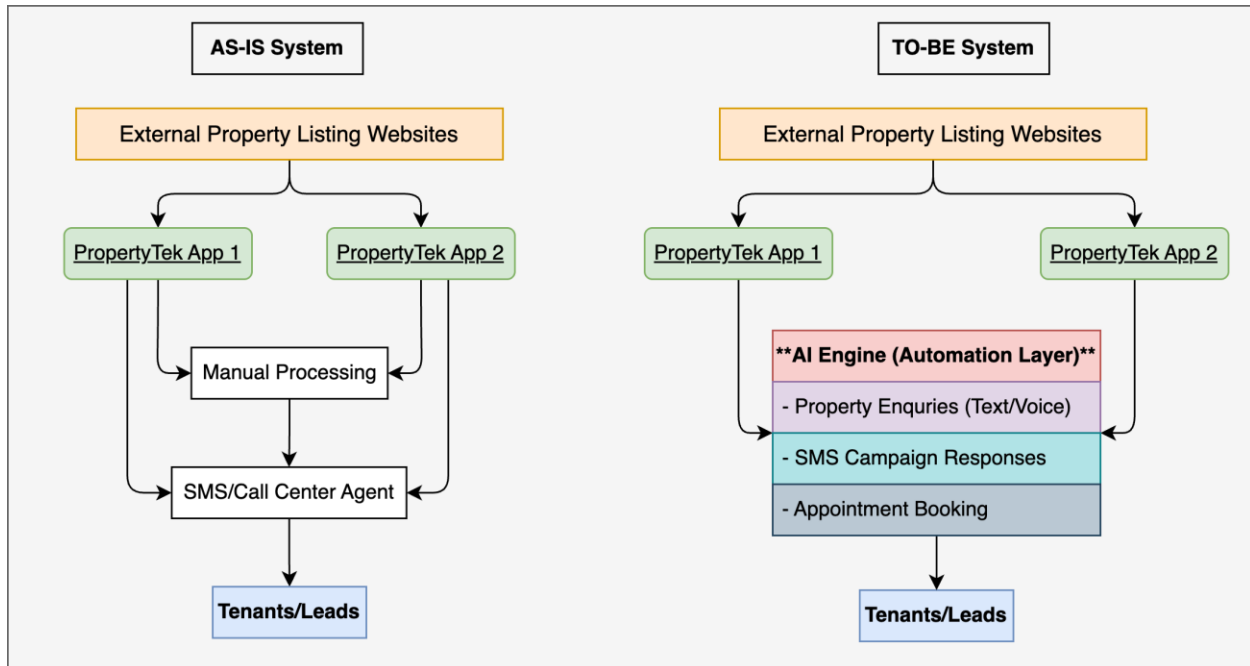
PropertyTek's portfolio of leading property management solutions—including TenantCloud, Tenant Turner, ShowMojo, and Rentler—is transforming the rental experience. To further optimize customer engagement and operational efficiency, we propose a **collaborative Proof of Concept (PoC)** to explore the integration of an AI-powered virtual assistant.

The goal of this PoC is to:

1. **Assess Current Systems** – Evaluate existing workflows, pain points, and opportunities for automation across PropertyTek's platforms.
2. **Validate Key Use Cases** – Test the AI assistant's ability to:
 - a. Handle property inquiries, booking requests, and client support via **text and voice**.
 - b. Automated responses for SMS-based campaigns, improve lead nurturing and tenant communication.
3. **Define a Scalable Solution** – Use PoC insights to design a tailored AI solution that aligns with PropertyTek's business goals.

2. AS-IS and TO-BE System

PropertyTek's existing workflow relies on **two separate applications** that manually aggregate property listings from external websites. These apps process data independently, requiring human intervention for tenant interactions—such as responding to inquiries, managing SMS campaigns, and scheduling appointments. This fragmented approach leads to inefficiencies, delays, and inconsistent customer experiences.



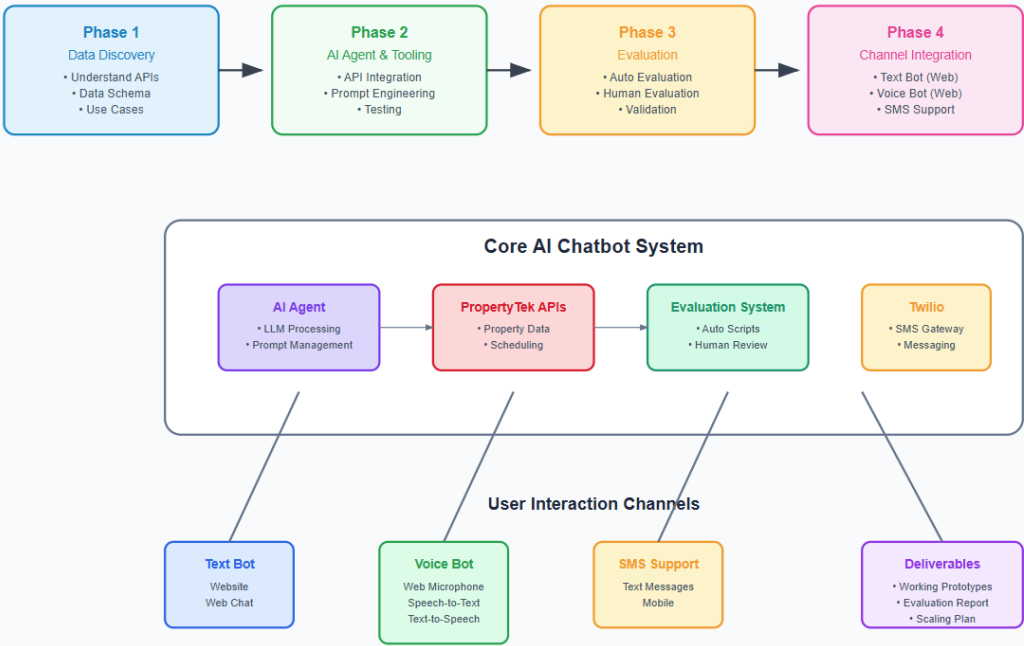
The future state introduces an **AI-powered automation layer** that sits between PropertyTek’s existing applications and end users. This centralized engine seamlessly integrates with both apps, unifying data flows and automating critical tasks—including instant responses to tenant inquiries (text/voice), dynamic SMS campaign management, and intelligent appointment booking.

3. Discovery Steps

In the Discovery Phase, We will collaborate with the PropertyTek team to deeply understand their business workflows, data sources, and API systems. This includes identifying key use cases (property inquiries, scheduling, landlord screening), accessing relevant APIs, and mapping out integration points across both PropertyTek platforms.

We will also define the chatbot’s functional scope, finalize key intents, and align on the success criteria for the POC. This phase ensures that all technical and business requirements are clearly understood before we begin development and integration.

PropertyTek AI Chatbot POC - High Level Design



4. Work Breakdown Structure

We are proposing 8 Week AI Bot Implementation Plan

- Weeks 1-2 (Planning):** Finalize requirements, use cases, and design infrastructure.
- Weeks 3-4 (Sample Core Dev):** Complete prompt engineering, launch web chatbot, and start SMS integration.
- Weeks 5-6 (Sample Integration):** Finish SMS/voice bots and begin test scripting.
- Week 7-8 (Testing):** Evaluate performance, gather feedback, and deliver final report.

Week	Phase	Tasks
1	Data Discovery & Planning	Data Discovery & Requirement Finalization
		Use Case Definition & Flow Design
2	Infrastructure Setup	Tooling & API Connector Development Plan
		Prompt Engineering & Template Design (Start)
3,4	Sample Development	Prompt Engineering & Template Design (Completion)
		Chatbot Engine Setup (Web)
		Twilio SMS Integration Plan (Start)

5,6	Sample Channel Integration	Twilio SMS Integration Plan (Completion)
		Voice Bot Implementation
		Evaluation Script Development Plan (Parallel)
7	Evaluation & Handoff	Evaluation Script Development Plan (Completion)
		Human Evaluation Session
		Final Report & POC Wrap-Up

4. Questions:

Category	Question	Answer
Technical Setup	Is Twilio already set up with a number for SMS/Voice?	[Answer: Yes/No. If no, temporary number will be provisioned.]
Technical Setup	Is the voice bot for telephony (calls) or web-based voice?	[Answer: Specify use case – e.g., "Telephony only for POC."]
User Flows	What are the top 5 user queries to support in POC?	[Answer: e.g., "1. Pricing 2. Availability 3. Location 4. Amenities 5. Application process"]
Pre-Qualification	What landlord pre-qualification questions are needed?	[Answer: e.g., "Credit score, rental history, pet policies, income verification"]
Success Metrics	How will POC success be measured?	[Answer: e.g., ">90% accuracy, <2s response time, 80% user satisfaction"]

5. Assumptions:

Category	Assumption	Rationale/Impact
API Access	PropertyTek will provide complete API documentation.	Required to develop functional API connectors for the AI agent. Required API should be provided by Property Tek.
API Security	API access will be read-only during POC.	Prevents accidental data modification during testing.
Twilio Setup	PropertyTek has (or can provision) Twilio accounts for SMS	Essential for testing telephony and messaging functionality.

Team Collaboration	Both product teams will actively participate in discovery/integration.	Critical for addressing system differences early.
Evaluation	PropertyTek team will conduct a human evaluation of bot responses.	Provides qualitative performance metrics beyond automated testing.
Voice Tech	POC will use cloud-based STT/TTS (e.g.: Azure).	Reduces infrastructure complexity/costs during prototyping.
Voice bot Scope	Just voice integration within the web chatbot (no phone call)	Reduces integration complexity significantly
UI Scope	No UI/UX design work required (basic interface acceptable).	Focuses effort on core AI functionality rather than presentation.
Cloud Infrastructure	PropertyTek will provide required cloud resources (on AWS, Azure etc.) for the PoC	Reduces integration complexity with other existing applications and clear separation ownership

Commerical

Role	FTE	Monthly Rate (In USD)	Indicative monthly price (in USD) *
Client Partner	Partial	--	Complementary
Technical Lead/ Architect	Partial	--	Complementary
Developer	1	\$ 4,150.16	\$ 4,150.16

8 Week Project Deliverable Cost

2 Developer x 2 Month	\$ 16,600.64
Discount	\$ 4,600.00
Total Bill-able Amount	\$ 12000.64