Final Review Meeting Notes – Boxer Property (Instructor Feedback Summary)

1. Executive Summary – Must Set the Stage Clearly

- **Tone:** Conversational, confident, client-aware.
- **Slide Strategy:** Use the agenda slide but **speak the executive summary**, don't write it out.
- **Opening Example (from professor):**

"Mark, thank you for your time over the last few weeks… We're excited to present a solution focused on your top priority — improving tenant retention. Today, we'll walk you through how we'll improve manager actions, boost client satisfaction, and reduce costs through better productivity."

KEY ACTIONS:
- Use Boxer's logo/image (no Mark photo) and communicate:

- Boxer = efficient operator.

- Retention = top concern.

- We didn't "discover" the challenge — we accepted and focused on solving it.

2. Challenge Section – Acknowledge, Don't Over-Explain

- Don't "re-teach" their problem. They know it.

- Compliment Mark for his clear articulation of the problem.
- Say: "Boxer is a top-tier operator. You clearly understand your challenge. Our focus was on solutioning, not discovery."

KEY ACTIONS:
- Move "Tenant Retention" to top of challenge list.

3. Gaps in Current Process – Keep Text Minimal

- Focus on:

- Insight-to-action disconnect.

- Property manager inconsistency.

- Tenants don't get updates.

- Root causes missed.

KEY ACTIONS:
- Finalize this slide visually.

- Remove second-line small fonts — say them aloud instead.

4. Solution – NBA (Next Best Action)

- Explain briefly what NBA is — not everyone knows the term.
- Don't overuse "LLM" — it scares non-technical clients.
- Name it - Consider calling it "data engine" or "Boxer insight generator".
- Communicate: NBA means "best action a property manager should take next, based on data."

KEY ACTIONS:
- Remove acronym overload.
- Say "Key Performance Indicators" once fully before using "KPI".

5. Dashboard & Workflow Visuals – Rework Presentation

- Good flow and segmentation, but asked for:

- **Separate Daily Summary for Managers.**

- Not just another cluttered dashboard.

- Don't overload CRM with "priority 1" tags — it'll backfire.

KEY ACTIONS:
- Propose 2 options:
  1. Enhanced dashboard.
  2. Separate daily summary view (top 3–5 critical actions).

6. Tech Architecture – Good Flow, Simplify Visuals

- Current CRM should be the "umbrella".

- Don't bury tenant feedback system in core tech diagram.

- Make it a separate "quick win" slide.

- Emphasize you're **not replacing systems**, just **enhancing them**.

KEY ACTIONS:

Split into two slides:

- Tech for NBA and decision-making.
- Tenant feedback loop (simple, low-lift improvement).

7. Implementation Roadmap – Currently Missing (Must Add)

• How will this roll out?
• Phase 1: CRM feedback loop (easy win).
• Phase 2: Data analytics.
• Phase 3: Pilot in select buildings.
• Phase 4: Feedback & scale.

KEY ACTIONS:

- Add clear MVP timeline.
- Include training, buy-in steps, and agile methods.

8. Benefits – Combine & Clean

Property Manager Benefits:

- Raises baseline performance.
- Provides smart insights they couldn't get alone.
- Integrates into current systems/workflow.

Customer Benefits:

- Transparency via ticket status updates.
- Better service quality.

Boxer Benefits:

- Reduce churn.
- Improve loyalty.
- Lower operational cost.
- Use existing systems = cost-effective.

KEY ACTIONS:

- Remove duplication.
- Use color-coding or visuals to match benefit to solution component.

9. Risks & Assumptions

- Highlight adoption risk, data quality issues, need for training.

- Show how these are **addressed in your roadmap.**

10. Final Summary Slide

- Make this strong and pitch-like:

- "Mark, we've shown how to boost manager performance, improve client experience, and reduce churn. All using tech you already have. Are you ready to start the journey?"

OK, so I would just say, Mark, it's a pleasure to get back in front of you today. We really appreciate the time that you've spent over the last six weeks both meeting with us in person and with your follow up meetings, we're excited to bring you today a solution which I will think. Will address you know the primary concern or challenge that you brought us, which is improving client retention among boxers current tenants. And so you know what I'd like to to do is just. Walk you through what we're going to cover today so you can know what to expect. Feel free during the presentation today to interrupt us if you have any questions, but everything that I cover in the executive summary and you'll see in the agenda, we are going to cover during our presentation today. You know, during our initial discussions, you really did focus on two things. One, the boxer was a very efficient operator and that two the but retention of existing clients was very important, not only to you in terms of what you're responsible for, but overall to boxers. Success and this has been somewhat exacerbated by the shift in commercial real estate that has gone on since the COVID epic. So what we have focused on is a, a process that will improve both the quality as well as the timeliness of property manager actions, right? That will produce superior results. For Boxer going forward, we're going to share with you the technology that will support that solution. And how we will help you deliver and determine what those insights are. We're going to extrapolate benefits from that. These will be an increased customer satisfaction. Increased revenue. As well as reduce costs as we expect to have some productivity gains. And then we'll also address risks and assumptions that could impact our timeline. We want to give you a vision of how we're going to implement this solution. You know, it won't be a solution that's implemented in day one. Our team uses an agile approach at not just in our initial solution development, but actually in our. Implementation as well, and you'll see that there'll be several milestones along the journey. For us to checkpoint and measure and to refine our vision for our ultimate solution, right.And then finally, we'll wrap it up and have any questions.

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Opening & Appreciation

- "Mark, it's a pleasure to be back in front of you today."

- "We truly appreciate the time you've spent with us over the last six weeks — both in person and in follow-up meetings."

Purpose & Overview

- "Today, we're excited to bring you a solution that we believe directly addresses your primary challenge: improving client retention among Boxer's current tenants."

- "I'd like to briefly walk you through what we'll cover so you know what to expect."

- "Please feel free to jump in with questions at any time."

What We Heard From You

- "In our early discussions, you highlighted two major points:

  1. Boxer is a very efficient operator.

  2. Retaining existing clients is critical — especially given the shifts in commercial real estate post-COVID."

Our Focused Solution

- "We've developed a process aimed at improving both the **quality** and **timeliness** of property manager actions."

- "This will help generate better outcomes for Boxer."

Tech & Insights

- "We'll walk you through the technology that supports our solution."

- "We'll also show how we'll help you generate and interpret insights that matter."

Expected Benefits

- "We expect to see three key benefits:

    - Increased customer satisfaction

    - Increased revenue

    - Reduced costs through productivity gains"

Risks & Assumptions

- "We'll also touch on risks and key assumptions that may affect our timeline."

Implementation Vision

- "This won't be a Day 1 solution — it will be implemented over time."

- "We follow an **agile approach**, not just in solution design but also in implementation."

- "You'll see clear milestones where we'll checkpoint progress and refine the solution as needed."

Wrap-Up

- "We'll finish with time for any questions you might have."