

Growth Action Plan

HarborPoint Property Management | AI
Lead: Elena Rossi | Primary Goal: Save time with AI

Industry: Property Management
Team Size: 32 across leasing and maintenance

Traffic/Users: 3,900 resident portal users; 1,100 monthly maintenance requests
Expected first measurable gains: 2-6 weeks

1) Executive Summary

- Likely bottleneck: Maintenance triage and vendor coordination are manual and slow.
- Fastest path: Automate maintenance intake categorization and resident updates
- Expected impact: Cut inbound status calls 25% (High confidence).
- Context: Leasing and maintenance coordination is fragmented across email and phone; ticket updates are inconsistent.

2) Opportunity Diagnosis

- Primary: Maintenance triage and vendor coordination are manual and slow.
- Secondary: Residents repeatedly ask for status updates.
- Assumption: Assumes work-order data is accessible via API exports.

3) 30-60-90 Plan (Outcome-Based)

Window	Focus	Action	Impact	Confidence
0-30 days	Service Desk	Automate maintenance intake categorization and resident updates	Cut inbound status calls 25%	High confidence
31-60 days	Vendor Ops	Auto-assign jobs by vendor SLA and capacity	Improve completion speed 12-18%	Medium confidence
61-90 days	Leasing	AI follow-up for tour no-shows and application nudges	Increase application completion 8-10%	Medium confidence

4) Top 5 Priority Actions

1. Standardize maintenance issue taxonomy and urgency tags.
2. Auto-send status notifications at key job milestones.
3. Create AI summaries for weekly property manager reviews.
4. Add exception alerts for jobs breaching SLA thresholds.
5. Track vendor turnaround by property and issue type.

Projected KPI Direction (30/60/90)



5) Offer Recommendation + KPI Scorecard

Recommended: AI Automation (Primary), Web Apps (Secondary). Track weekly: Ticket cycle time, resident call volume, SLA compliance.

6) Risks & Mitigation

- Risk: Incomplete ticket data. Mitigation: required input fields.
- Risk: Vendor pushback. Mitigation: phased rollout with top vendors first.
- Risk: Update fatigue. Mitigation: resident preference controls.

7) Immediate Next Step

Automate updates for one property portfolio and benchmark call volume reduction over 14 days.

"If useful, I can turn this into a hands-on execution sprint with milestones, owners, and delivery dates."

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