Intelligent Choice

Readiness Summary

Prepared for

James Hartley

Meridian Property Management

7 September 2026

CLIENT CONFIDENTIALITY & ANONYMISATION

This sample document is based on a real client engagement. The organisation and individual names have been changed to protect client confidentiality. The document is published with the client's permission for illustrative purposes.

Intelligent Choice treats client confidentiality and the responsible handling of business information as fundamental to our work.

SECTION 01

Executive Summary

IC recommends Meridian proceed immediately to a Solution Blueprint session for Maintenance Coordination on Autopilot — the automated trade dispatch, follow-up, escalation, and logging system that removes Sarah from the centre of every coordination loop. The case for moving now is unusually clear: the coordination logic is already fully understood, the two integration anchors are confirmed, and the only prerequisites are a spreadsheet migration and an SMS platform decision — neither of which is technically complex. The urgency case is not hypothetical. The hot water incident three months ago — a tenant without hot water for four days over a weekend, the landlord informed by the tenant rather than Meridian — is what the current model produces when Sarah is unavailable. The portfolio has grown from 280 to 340 properties and is tracking toward 500. Every month the coordination loop runs on Sarah's memory and personal phone is another month of landlord attrition risk compounding across a larger book. The window for fixing the operational foundation before the next growth push is defined and closing.

65–70%
Sarah's day consumed by trade-chasing that could run without her

4 days
Tenant without hot water — landlord heard from them, not Meridian

280 → 340
Portfolio growth that makes the current model arithmetically unsustainable

SECTION 02

What We Found

One person is manually running every step of a process that could run itself

An estimated 65–70% of Sarah's working day is consumed by a coordination sequence she can describe precisely: send an SMS, wait, follow up, escalate, log, notify. There is no judgment complexity in the loop — it is sequential, rule-based, and time-triggered. The work is not hard; it is relentless. And because it runs on Sarah's memory and personal phone, it stops the moment she is unavailable.

The hot water incident is not a one-off — it is what the model is built to produce

Three months ago, a tenant went four days without hot water over a weekend. The landlord found out from the tenant, not from Meridian. That failure was not a lapse — it was the structural output of a process that depends entirely on one person being available and on top of every job at every moment. Phil identified this type of event as the actual driver of landlord attrition: not poor property management, but absent communication when it matters most.

MaintenanceManager failed on the trades interface — and that defines the specification this time

The prior attempt failed because it asked trades to adopt a new platform — introducing friction into the channel rather than working within it. The team experienced relief when it was abandoned, and James has acknowledged the 'here we go again' dynamic that any new engagement must address directly. That failure is not a reason for caution about this direction; it is the specification. Both sessions confirmed without qualification: SMS only, no app, no portal. Building to that constraint from the start means this is a different solution to a better-understood problem.

SECTION 03

Three Directions Considered

Maintenance Coordination on Autopilot — Recommended

When a maintenance job enters PropertyMe, the system automatically dispatches an SMS to the relevant trade, waits for a defined response window, follows up if there is no reply, escalates to the next trade if the threshold is exceeded, and writes each status change back to the PropertyMe job record in real time. Sarah moves from manually executing every step to monitoring exceptions. The coordination choreography runs without her driving it. This is the natural starting point because the logic is already fully understood — Sarah can describe the rules precisely, which means there is no discovery work left to do on what the system should do. PropertyMe's Jobs API and Gmail API are both confirmed integration anchors. The two prerequisites — migrating Sarah's spreadsheets to a cloud-hosted environment and formalising the SMS channel through a business platform — are sequenced ahead of the build and do not require Sarah's active involvement to complete.

Intelligent Intake: AI Triage at the Maintenance Front Door

A language model classification layer applied to incoming tenant maintenance descriptions — categorising job type, scoring urgency, and routing to the right trade from the moment a request enters the system. Tenant descriptions are currently unstructured, inconsistent, and frequently inaccurate relative to what the trade finds on site, which means misclassification at intake has downstream costs in wrong trade assignment and wasted call-outs. This is a Phase 2 build. It requires Direction 1 to be operational first — structured job records must be accumulating in PropertyMe, and trade outcome data must be feeding back against intake descriptions before the classification layer has a correction signal to improve from. Deploying it before that feedback loop exists produces a static accuracy ceiling. Once Direction 1 is running, this becomes a natural extension of the same architecture.

Landlord Communication That Writes Itself

PropertyMe job state changes automatically trigger a language model that generates a draft landlord update email, surfaced in Gmail for PM review before sending. Every status transition produces a ready-to-send communication rather than an item on a PM's mental checklist — and a consistent, documented trail rather than ad hoc composition from individual memory. This direction depends on the same foundational work as Direction 1: PropertyMe job records must be complete and updated in real time before status transitions can trigger reliably. Once that foundation is in place — which Direction 1 delivers — this becomes the natural Phase 1 companion. It addresses directly what Phil named as the churn driver, and it means Meridian starts protecting landlord relationships from the moment coordination automation is live.

SECTION 04

Readiness Assessment

Direction 1 is the only one ready to build today — the table shows exactly why, and why the sequence that follows is the only one that makes sense.

Direction	Technical Readiness	Commercial Case	Sequencing
Maintenance Coordination on Autopilot	PropertyMe Jobs API and Gmail API confirmed. Two prerequisites only: spreadsheet migration to a cloud-hosted environment and business SMS platform selection. Neither is technically complex; both are sequenced ahead of the build.	Phil has confirmed budget in the current financial year and moves once the loss case is clear. The hot water incident and Sarah's 65–70% coordination load together make that case without ambiguity.	Starts now. Preparatory phase first — spreadsheet migration and SMS formalisation — then the automation build. Sarah's operational load is protected throughout.
Landlord Communication That Writes Itself	Technically dependent on Direction 1: requires real-time PropertyMe job records before status transitions can trigger reliably. The webhook-to-language-model architecture is buildable once that foundation exists.	Directly addresses the failure Phil named as the actual landlord churn driver. Commercial case is strong and connected to the same cost-of-inaction frame.	Phase 1 companion — begins in parallel with or immediately after Direction 1 once the event stream is live. Not a separate build cycle.
Intelligent Intake: AI Triage at the Front Door	Requires structured job records and trade outcome data accumulating in PropertyMe before the classification layer has a correction signal. Cannot operate meaningfully without Direction 1's data foundation in place.	Real use case and documented downstream costs from misclassification. Phase 1 operations will produce the cost-of-inaction evidence that makes the Phase 2 investment case materially stronger.	Phase 2. Correctly deferred — not because the use case is weak, but because accuracy improvement requires outcome data that only exists once Direction 1 is running.

SECTION 05

Next Steps

Step 1 — Solution Blueprint Session

The Blueprint session has four things to resolve before a build can begin. First, architecture confirmation: a technically validated design that meets both hard constraints — SMS as the trade communication channel, PropertyMe as the integrated system of record — and that demonstrates explicitly how this differs from the MaintenanceManager approach. This is not a reassurance exercise; it is a trust-rebuilding agenda that must be addressed structurally. Second, sequencing: a phased plan that separates the preparatory work from the automation build, with no configuration burden placed on Sarah while she is simultaneously managing live coordination demand. Third, knowledge capture: surfacing Sarah's undocumented institutional knowledge — trade selection logic, urgency thresholds, escalation criteria — in a structured way that informs the automation rule design. Fourth, commercial alignment: Phil leaves with enough operational and financial detail to convert the session output into a build mandate, not a further discovery loop.

Step 2 — Prototyping Session

The Prototyping session builds the coordination loop against live Meridian data — real jobs, real trades, real PropertyMe records — and proves the architecture works before full deployment begins. A job enters PropertyMe, an SMS dispatches automatically, a follow-up fires when there is no reply, and the status writes back to the job record without Sarah touching it. This is the moment the 'here we go again' dynamic is replaced by something the team has seen working. Sarah sees her load reducing in practice, not in proposal. Michelle has a functioning system to evaluate rather than a concept to adopt. And Phil has operational proof that the loss case is being addressed — not a progress update, but evidence.

Proposed Technology Stack

- **n8n (Workflow Orchestration)**: Runs the coordination logic — triggers, decisions, and actions — as a connected automated sequence without manual intervention
- **Airtable (Structured Data Layer)**: Hosts the prototype data environment — structured, connectable, and queryable throughout the build and testing phase
- **Claude API (AI Inference Layer)**: Handles judgment-based tasks — classification, generation, and reasoning — that rule-based logic cannot perform
- **PropertyMe (Jobs API)**: Confirmed read/write integration anchor — every automated status update writes back here in real time
- **Twilio**: Business SMS channel — dispatches trade notifications, tracks replies, and logs all messages to a structured record
- **Gmail API**: Confirmed email integration — surfaces AI-drafted communications for human review before sending

Who Needs to Be Involved

- **Phil Hartley**: Commercial decision-maker whose presence converts session output into a build mandate, not another discovery loop.
- **James Hartley**: Operational sponsor who already holds an accurate picture of the PropertyMe-versus-spreadsheet gap confirmed in the technical session.
- **Sarah**: Holds the only complete operational picture, including undocumented trade selection and escalation logic the automation must reflect.
- **Michelle**: Most PM-exposed to the coordination burden; her active participation begins building adoption ahead of deployment.
- **IC Technical Lead**: Must make validated architecture calls against confirmed PropertyMe Jobs API and SMS platform constraints in the room.
- **PropertyMe Integration Partner**: Confirmed PropertyMe API credentials remove the material delivery risk identified at the architecture confirmation stage.

SECTION 06

Investment

SESSION	INVESTMENT
Solution Blueprint Session Architecture workshop, confirmed design, phased delivery plan	[illegible]
Prototyping Session Working prototype on real client data	[illegible]
TOTAL INVESTMENT	[illegible]

Flat fee · invoiced on confirmation of each stage · all prices exclusive of GST · full production build scoped separately once the prototype has proven the approach.

Ready to move forward?

James, the next step is a single session — and everything needed to begin it is already in place. Let's get the date in the diary.



Travis Shaw
Founder, Intelligent Choice
travis@intelligentchoice.digital
intelligentchoice.digital