Intelligent Choice

STEP 2 · BLUEPRINT

Solution Blueprint

How automated maintenance coordination will work, and what we agreed.

Prepared for

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Meridian Property Management
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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.

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SECTION 01

Readiness Outcome and Blueprint Objectives

The AI Readiness Briefing recommended moving to a Solution Blueprint for **Maintenance Coordination on Autopilot**: automated trade dispatch, follow-up, escalation and logging, removing Sarah from the centre of every coordination loop. The case rests on three findings: the operational load (an estimated 65–70% of Sarah's day on a rule-based sequence that stops when she is unavailable), the urgency case (a tenant without hot water for four days over a weekend, with the landlord hearing from the tenant rather than Meridian), and growth (280 to 340 properties, tracking toward 500).

Two other directions, AI intake triage and automated landlord drafting, are deferred to Phase 2 because both depend on the job data that Direction 1 creates. The technology stack and the two integration anchors (PropertyMe Jobs API, Gmail API) were confirmed feasible in the Technical Session, so this Blueprint starts from a validated direction, not an open question.

WHAT THIS BLUEPRINT MUST RESOLVE

Objective	What it means
1. Architecture confirmation	A validated design that meets both hard constraints (SMS-only trade channel, PropertyMe as system of record) and shows explicitly how it differs from the MaintenanceManager attempt. A trust-rebuilding exercise, addressed in the diagrams (sections 03 and 04) and the technical sign-off (section 05).
2. Sequencing	A phased plan that separates preparation (spreadsheet migration, SMS platform) from the build, so neither adds configuration load to Sarah while she runs live coordination.
3. Knowledge capture	Sarah's undocumented knowledge (trade selection, urgency, escalation) captured as explicit rules, and each rule checked for whether it is a genuine business rule or a workaround for one person doing everything.
4. Commercial alignment	Phil leaves with enough detail to convert this session into a build mandate for Prototyping, not a further discovery loop.

The outcome is a decision to commit to Prototyping, backed by a validated specification. Working software is not part of this stage.

SECTION 02

Knowledge Capture: How Coordination Works Today

The rules below were captured through private, case-based interviews with Sarah, walking through recent real jobs including the hot water incident. Michelle is the reference-data SME for landlords, properties and tenants, to be confirmed. Each rule records its source. The as-is rules are kept separate from the improvement options in section 07, and each needs Sarah's sign-off before the group sees it.

Assignment and selection logic

Condition	Action and selection rule	Source	Confidence
Job type = plumbing	Assign to Trade A (preferred plumber). If no reply in 30 minutes, Trade B.	Interview, confirmed against 3 real jobs	High
Job type = electrical	Only two trades on the panel (Trades C and D). Always try C first, regardless of urgency.	Interview	High
General handyman, non-urgent	Batched into a weekly handyman run, not dispatched individually.	Interview, confirmed against 2 real jobs	Medium
Tenant reports pest issue	Routed directly to the pest control contractor, bypassing the general trade pool.	Interview	High
Landlord has nominated a trade for the property	Offer the job to the nominated trade first. If no reply in 30 minutes, fall back to the standard trade for that job type.	Added at Blueprint review, after a replay mismatch. To be validated with Sarah	Medium

Urgency thresholds

Tier	Definition or trigger	Expected response	Notes
Critical	No hot water, no power, gas leak, lock or security failure	Within 1 hour	Landlord notified immediately
High	Active water leak, essential appliance failure	Within 4 hours	Landlord notified only if unresolved by end of day
Standard	Non-essential appliance fault, minor repair	Within 1 business day	
Low	Cosmetic issues, non-urgent requests	Next scheduled visit	No formal SLA currently

Escalation criteria

Trigger	Escalation path	Timing	Notes
Trade does not reply to SMS	Escalate to backup trade for the same job type	30 minutes	Business hours only
Trade confirms but does not attend	Escalate to Sarah directly	When the window passes	Landlord notified at this point
Same issue reported twice by a tenant	Auto-escalate to Michelle	On the second report	Currently relies on memory
Critical job, no response, after hours	After-hours emergency contractor list	1 hour	List currently held only on Sarah's phone

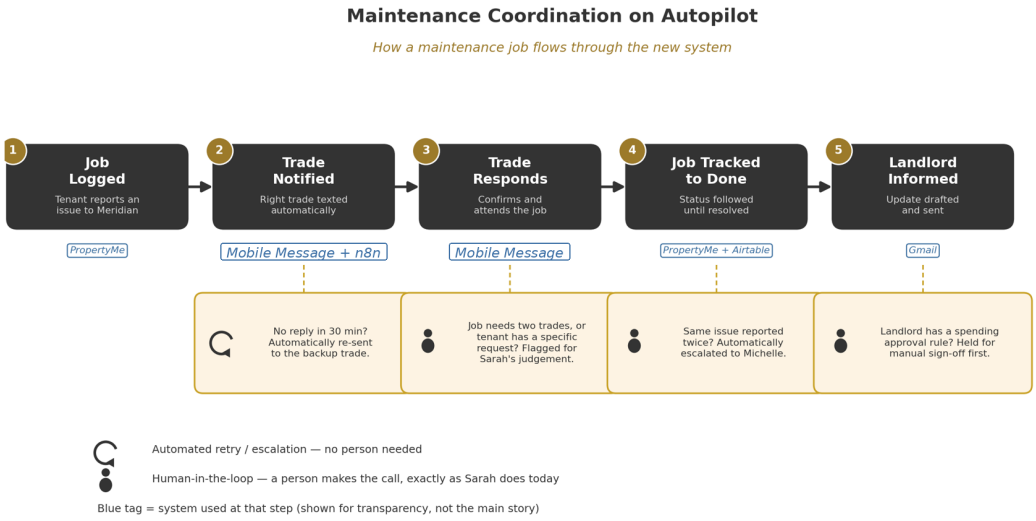
Edge cases and exceptions

Exception	How it is handled today	Automatable, or human-in-the-loop?
Preferred trade is on leave	Sarah reroutes manually from memory	Automatable once trade availability is held as data
Tenant requests a specific trade (past bad experience)	Sarah overrides the assignment manually	Automatable with a persistent tenant or property exception flag
Job spans multiple trade categories	Sarah splits it manually into two jobs	Human-in-the-loop: a judgement call each time
Landlord has a $500 standing approval threshold	Sarah checks a mental list of affected landlords	Human-in-the-loop until landlord preferences are held as data

SECTION 03

Process Journey

This is the primary artifact for the group session. It tells the story of a maintenance job in plain language. Systems appear as small transparency tags, not the headline. The callouts show the exceptions captured from Sarah's sessions, which is where the human stays in the loop.



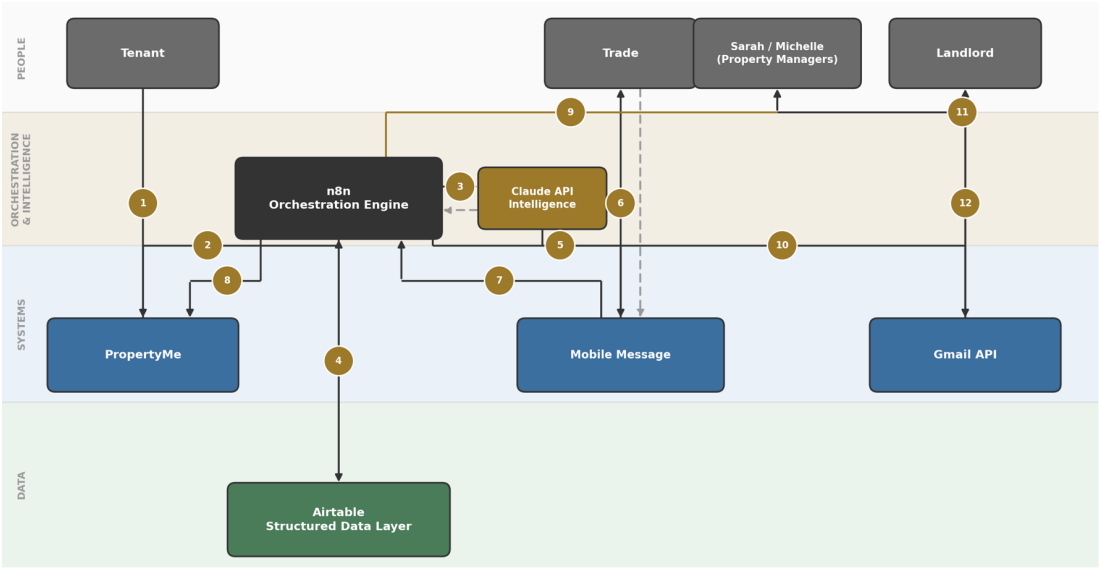
Reading the journey. The automatic re-send after 30 minutes with no reply, the flag for Sarah's judgement on split or specific-trade jobs, the escalation to Michelle on a repeat report, and the landlord approval hold are the four places where the system acts, or hands over, without anyone needing to remember them. Every one of them maps to a rule in the Knowledge Capture tables.

SECTION 04

Technical Architecture

This diagram is for the technical conversation with the IC Technical Lead and the PropertyMe integration partner. Its job is precision rather than accessibility. It is included here so the Blueprint is complete, but it is presented in the focused technical session, not the group presentation.

Meridian — Maintenance Coordination on Autopilot: Technical Architecture



Solid = primary flow Dashed grey = response/return path Gold = human-in-the-loop routing

1. Tenant reports issue — logged as PropertyMe job
2. New job triggers n8n (PropertyMe webhook/poll)
3. n8n calls Claude for judgment calls (edge cases, drafting)
4. n8n logs job + assignment to Airtable
5. n8n dispatches SMS to trade via Mobile Message
6. SMS delivered to Trade; reply received back
7. Reply forwarded to n8n via webhook
8. n8n writes status update back to PropertyMe
9. n8n routes to PM for human judgement — an exception (Appendix A) or a repeat-issue escalation
10. Claude drafts landlord update, written to Gmail
11. Draft surfaced to PM for review
12. Email sent to Landlord after PM approval

What the diagram does not show. The diagram shows the primary flow. After the SMS is dispatched (step 5), n8n runs a timed check against the 30-minute threshold. If it closes with no reply, n8n repeats step 5 against the backup trade and records the escalation in Airtable. If the backup trade also fails to respond, step 9 routes the job to a Property Manager for direct human intervention. The diagram shows the as-is pattern. Phil has adopted pooled dispatch for critical and after-hours jobs (section 07). This diagram shows the general as-is flow. The critical and after-hours branch in the n8n logic needs to be redrawn before the technical session.

Airtable is where the business value sits. Step 4 (n8n logs the job and assignment to Airtable) understates the point: Airtable is written to repeatedly through a job's life, and it is what makes every exception and escalation rule executable reliably.

SECTION 05

Technical Confirmation

> **Gate: until this section is complete and signed by the IC Technical Lead and the PropertyMe integration partner, the engagement is not de-risked. The group Blueprint session and any commercial sign-off should not proceed ahead of this confirmation.**

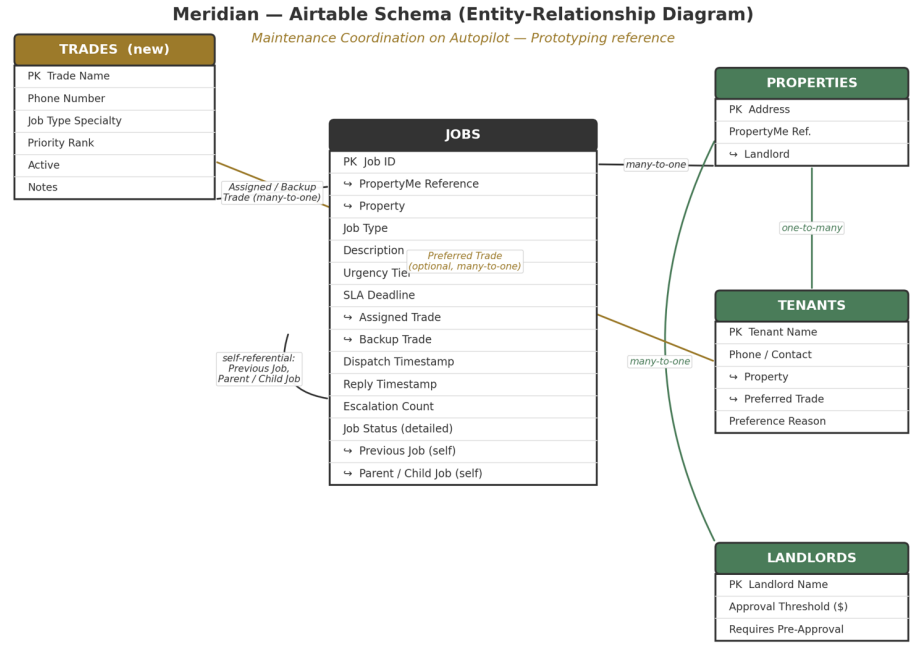
Business rules mapped to the Airtable schema

Every row in the Knowledge Capture tables has a corresponding row here. A rule without a schema mapping is not yet build-ready.

Business rule	Airtable table	Fields needed	Notes
Trade assignment by job type	Jobs	Job Type, Assigned Trade (linked), Backup Trade (linked)	Trade pool per job type confirmed with the integration partner
Urgency tiers and response windows	Jobs	Urgency Tier (select), SLA Deadline (computed)	SLA Deadline = job created + tier threshold
Trade no-reply escalation (30 min)	Jobs	Dispatch Timestamp, Reply Timestamp, Escalation Count	n8n compares elapsed time to the Dispatch Timestamp on each check
Granular job status	Jobs	Job Status (single select): New, Trade Assigned, Confirmed or Scheduled, In Progress, Awaiting Parts, Escalated, Completed, Closed	Rolls up to PropertyMe's Open or Closed, so PropertyMe needs no change. Addresses the visibility gap behind the hot water incident
Repeat-issue escalation	Jobs, Tenants	Previous Job (linked), Issue Count	Needs jobs linked to the same tenant and property. Bounded window adopted (Phil): 7 days proposed, to be confirmed with Sarah
Multi-trade split	Jobs	Parent Job (linked), Child Jobs (linked)	Depends on the PropertyMe linked-job question below
Tenant-specific trade request	Tenants	Preferred Trade (linked), Preference Reason	Fields on the Tenants table

Business rule	Airtable table	Fields needed	Notes
Landlord approval threshold	Landlords	Approval Threshold, Requires Pre-Approval (checkbox)	Fields on the Landlords table. Captured in Phase 1 (adopted by Phil)
Trade contact and specialty	New: Trades	Trade Name, Phone Number, Job Type Specialty, Priority Rank, Active	Entirely new structured data. Trade details are on Sarah's phone or spreadsheet today

Airtable schema



PK = Primary key ↪ = Linked record (foreign key)

Trades table is entirely new — this data does not exist in structured form anywhere today. Job Status now carries the detail Section 6 identified as missing (see notes).

The schema has five tables. Jobs is the hub. Properties, Tenants and Landlords are reference data expected to sync from PropertyMe (see the reliability table), and they carry the preference fields. Trades is the only table built entirely from new data.

Shared visibility

The hot water incident happened because nobody but Sarah could see where a job stood, and a binary Open or Closed status does not fix that. The recommended answer is an Airtable Interface built directly on the Jobs table, with no separate tool. It gives Phil, the James, Michelle and Sarah the same live view of every open job's status without asking anyone.

Integration reliability

Each question needs a decision, not an answer. 'To be confirmed' is not an acceptable final state for this document.

System	Question	Decision	Risk if unresolved
PropertyMe	Does the Jobs API support webhooks, or only polling? At what interval?	To be confirmed with the integration partner	SLA accuracy depends directly on this
PropertyMe	How are Property, Tenant and Landlord changes synced into Airtable: real-time, periodic batch, or manual refresh?	Manual-only refresh is ruled out. Periodic sync with a reconciliation check, to be confirmed with the integration partner	Stale reference data could misroute jobs or misapply landlord approval thresholds
Mobile Message	What are the rate limits and delivery guarantees for SMS dispatch?	Sending is throttled, delivery receipts are logged, and opt-outs are honoured. Rate limits to be confirmed with the integration partner	Dispatch delay at high volume could silently breach SLA
Duplicate dispatch	Could a trade be texted twice for the same job?	Each job carries a unique dispatch key, checked before every send. A trade is texted once per job per step	Duplicate messages erode trust with trades
Reply reading	How are free-text trade replies interpreted?	The model reads each reply. Low-confidence replies (for example 'ok' or 'tmrw') are flagged to a property manager and never booked automatically	A misread reply could book a job no trade has agreed to
Claude API	What happens if a judgement-call request fails or times out mid-workflow?	Proposed: n8n retries once, then flags the job for Property Manager review	A silent failure could stall a job indefinitely
n8n	What is the retry and alerting philosophy for a failed step?	Recommended: alert the IC team on any step that fails after retries are exhausted	Automation could be less reliable than the manual process it replaces

Resolution of open questions

- After-hours emergency contractor list: centralise into the new Trades table before the build (operational, James). Decision recorded once confirmed.
- $500 landlord approval threshold: captured as fields on the Landlords table in Phase 1 (adopted by Phil).
- PropertyMe linked-job support for multi-trade splits (technical, IC Technical Lead and PropertyMe partner). Decision recorded once confirmed.

- Reference-data SME for landlord, property and tenant onboarding: Michelle, or another role (operational, James). To be confirmed.

SECTION 06

System and Data Touchpoints

Step	System	Read or write	Data involved
Job created	PropertyMe	Read	Job reference, Job Type, Description, Urgency (entered at logging), Status (Open or Closed)
Trade SMS dispatched	Mobile Message	Write	Trade phone number, message, timestamp
Trade reply received	Mobile Message	Read	Reply content, timestamp
Job status updated	PropertyMe	Write	Open or Closed only. Granular status lives in Airtable
Landlord update drafted	Gmail	Write (draft)	Draft content, linked job reference

Phase 2 note: once AI intake is built, Job Type, Description and Urgency may move from manual entry to AI-assisted. This table should be revisited at that point.

SECTION 07

Decisions for Phil

Phil's decisions are recorded below. Adopted options replace the as-is rule shown beside them. Stage 2 options are parked for later and do not change the Phase 1 build. Stage 2 is separate from the Phase 2 AI intake work.

Current rule (as captured)	Constraint it solves	Proposed option	Trade-offs to discuss	Decision
Trade A, wait 30 minutes, then Trade B, wait 30 minutes, then escalate	One person can hold one conversation at a time	Offer to a pool of two or more trades at once; award to the first to accept. Cuts worst-case response from 60+ minutes to about 15	Trades may compete for the same job and feel it is adversarial. Needs Sarah's read on trade relationships	Adopt

Current rule (as captured)	Constraint it solves	Proposed option	Trade-offs to discuss	Decision
After-hours critical jobs go to a single emergency contractor list	Same one-person limit, costlier here	Apply the pooled approach after hours	Likely lower risk. After-hours work may already be 'whoever is available'	Adopt
Trade unavailability is found only when a dispatched trade does not reply	No persistent record of trade availability	Check tracked availability before dispatch, removing up to 30 minutes of waiting	Depends on availability data being kept current	Stage 2
'Reported twice' triggers escalation with no time limit	Memory does not track time windows well	Define 'repeat' as two reports within a bounded window, for example 7 days	Needs Sarah's judgement on the right window	Adopt
Trade preference set from memory, with no feedback	Reliability is informal and undocumented	Use captured dispatch and reply timestamps to build a reliability ranking over time	A data ranking could disagree with gut feel. Decide whether it informs or overrides judgement	Stage 2
A multi-trade job is split manually, from scratch, every time	Judgement with no system support	Claude drafts a proposed split for review and confirmation	Low risk because a person confirms. A Phase 1 build-effort question	Adopt
Landlord $500 threshold held in Sarah's memory	No structured landlord data	Capture as fields on the Landlords table in Phase 1	Adds build scope to Phase 1, removes the manual check	Adopt

SECTION 08

Sign-Off

The Blueprint is signed off in two parts. Technical sign-off confirms the architecture and integration decisions. Commercial sign-off gives the build mandate for Prototyping.

Sign-off

Role	Name	Signature	Date
IC Technical Lead (technical sign-off)			
PropertyMe Integration Partner (technical sign-off)			
Phil (commercial sign-off, build mandate)			



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