CASE STUDY // MERIDIAN PROPERTY MANAGEMENT

How we worked with Meridian, step by step

Written by Travis Shaw. What it felt like to work with us, and what it produced. A real engagement, with names changed and published with the client's permission.

> **Travis's short version:** a good property manager was spending about two-thirds of her day chasing trades by text. In four short steps we designed, proved and tendered a fix, with the client deciding at every stage. The builder has now been appointed.

At a glance	
The client	A rental property management firm with a small office team. Portfolio grown from 280 to 340 properties, heading toward 500.
The problem	One person coordinated every maintenance job by hand, using a spreadsheet and her personal phone.
What we did	Our four steps: Discover, Blueprint, Prove, Procure. Each step is typically 5 to 15 business days of effort.
Where it stands	All four steps are complete. The tender has finished and Meridian has appointed a builder. Meridian could have stopped at any step.

1. Where Meridian started

I first sat down with the Meridian team to understand one thing: why a good property manager was spending her days chasing trades. Sarah was coordinating every maintenance job by hand. I estimated that 65 to 70% of her working day went on a sequence she could describe precisely: send a text, wait, follow up, escalate, log, notify. The work was not hard. It was relentless, and it stopped the moment she was unavailable.

The cost was real. In the months before we started, a tenant went four days without hot water over a weekend, and the landlord heard about it from the tenant, not from Meridian. Phil, who makes the commercial decisions, told me that kind of silence, more than the quality of the management, is what makes landlords leave. The portfolio was growing from 280 to 340 properties, so the problem was getting bigger every month.

They had also tried before. An earlier product, MaintenanceManager, failed because it asked small trade businesses to adopt a new platform. The team felt relief when it was dropped, and James was honest with me about the "here we go again" feeling any new project would meet. That failure became our specification: **text messages only, no app, no portal.**

2. How we worked, step by step

Step 1: Discover

I ran an executive session and a technical session with Meridian’s leadership, and confirmed that the systems they already use (their property management system and their email) could be connected to. Sarah could already describe her rules precisely, so there was no discovery work left on what the system should do.

What Meridian received: a Readiness Summary setting out three directions, why one was ready to start now, and why the other two should wait. Automated trade dispatch, follow-up and escalation came first. AI triage of tenant requests and drafted landlord updates were deferred, because both need the job data the first one creates. **The decision:** go to a Blueprint.

Step 2: Blueprint

I interviewed Sarah privately, case by case, walking through recent real jobs including the hot water incident, and wrote down the rules that lived only in her head: which trade gets which job, what counts as urgent (critical within an hour, high within four hours, standard within a business day), and when to escalate. Each rule recorded where it came from and how confident we were. Each was also checked for a harder question: is this a genuine business rule, or a workaround for one person doing everything?

What Meridian received: a Solution Blueprint with the process told as a plain-language journey, a technical design confirmed with their property system's integration partner, a recommended live job view everyone can see, and seven proposed changes for Phil to decide. He adopted five and parked two for later. The biggest: offering a job to a pool of trades at once instead of one after another cuts the worst-case wait from over an hour to about 15 minutes. **The decision:** technical and commercial sign-off, and a go-ahead to prototype.

Step 3: Prove

We agreed the success criteria before testing, so the result would be measured against a standard set in advance and not a story told afterwards. Then we tested in two stages. First, a replay of 40 past jobs through the routing logic without contacting anyone, with Sarah comparing the system's decisions with her own. Second, a supervised live demonstration: real texts to real trades, and real updates written back to Meridian's property system, with Sarah present as the safety net.

What we measured	Target	Result
Routing matches Sarah's own decisions (40 past jobs)	90% or better	95% (38 of 40). Both misses involved a landlord-nominated trade that was not in the data
Live jobs completed with no one stepping in	All but exceptions	6 of 8. The other 2 went to a person as designed
Silent failures (a job with no owner and no flag)	None	None
Trades taking part by text only	All trades	All five trades replied by text
Time from job logged to trade confirmed (median)	n/a	About 3 hours before, about 40 minutes in the demonstration

A proof of concept is only useful if it is honest about what failed. We found four problems that would have been expensive to discover during a full build: trades replying with fragments such as "ok" or "tmrw", a manual and an automatic dispatch overlapping so a trade was texted twice, an after-hours plumber missing from the contractor list, and tenants replying to the trade's number. Each was fixed or written into the requirements. **The decision:** proceed to a tendered build, with those changes in the brief. And I was clear with Meridian about where the prototype stops: it was demonstrated, not left running.

Step 4: Procure

I turned the validated design and the test findings into a Request for Proposal, a self-contained brief that a builder can price from. It sets the hard constraints (text only for trades, the property system stays the system of record, a person always has the last word, no silent failures) and lists numbered requirements marked Must, Should or Could. I then helped Meridian assess the responses, and Meridian has since appointed a builder. I stay independent: **we design, prove and assess the work, and the build is quoted and delivered by a partner.** Our advice carried no stake in who won, and choosing the builder was Meridian's decision.

3. What it felt like

- **Light on their time.** Each step is typically 5 to 15 business days of effort. Sarah's load was protected throughout: no configuration work landed on her while she was running live coordination.
- **Everyone had a role.** Phil made the commercial decisions, James sponsored the work, Sarah held the operational picture and Michelle, the property manager most exposed to the coordination burden, took part so the team would be ready to adopt it.
- **Decisions stayed theirs.** A fixed fee was agreed before each step, and Meridian could have stopped after any of them.
- **Honest about the limits.** We reported what failed, what the prototype did not cover and what we had not yet tested.

> *"Travis took the time to truly understand our unique business bottlenecks and engineered the perfect automated solution."*
> **Meridian Property Management**

To be clear about our role: I design and prove the approach, and a builder you choose delivers it. That is what keeps the advice independent.

4. What I take from it

- **Start from the problem, not the technology.** The first question was never which tool. It was why a good person's day looked like that.
- **Let the last failure write the brief.** The earlier app failed on one point, so that point became the rule everything else had to meet.
- **Write the rules down before anyone builds.** Most of the value was in capturing what only one person knew, and questioning which of it should survive.
- **Set the test in advance and report what failed.** Trust comes from a standard agreed before testing and from the problems we show, not from a good story.
- **Stay independent.** Because we build nothing and sell nothing, you can take our plan to any provider you like.

5. Reference documents

The real paperwork behind this story, one line per document. Click a name to open it.

Initial Readiness Proposal	The free written proposal that follows the first conversation.
Phase Schedule 1: Discover	Scope, deliverable and terms for step 1.
Readiness Summary	The step 1 deliverable: three directions and which is ready now.
Phase Schedule 2: Solution Blueprint	Scope, deliverable and terms for step 2.
Solution Blueprint	The step 2 deliverable: the rules, the design and the decisions.
Phase Schedule 3: Prove	Scope, deliverable and terms for step 3.
Proof of Concept Report	The step 3 deliverable: what was tested and what was found.
Phase Schedule 4: Procure	Scope, deliverable and terms for step 4.
Request for Proposal	The step 4 deliverable: the brief a builder prices from.

Sample documents use a real engagement with names changed and are published with the client's permission.

Want to talk this through for your business?

Book a free 15-minute call. We'll look at your situation and give you a straight answer, with no jargon and no sales pitch.

Let's Chat

Opens the request form on our website. Free, no obligation.