



Holloway Consulting

AI workflow design and implementation

Sample Design Blueprint

A hypothetical property management example showing what a Holloway Consulting Design Blueprint could produce after discovery sessions.

SAMPLE BUSINESS

Lakeside Property Management

SCENARIO

120 residential rental units

BLUEPRINT FOCUS

Tenant questions and maintenance intake

RECOMMENDED FIRST BUILD

AI Tenant Front Desk with knowledge-grounded answers and case-based maintenance intake.

Executive Summary

Lakeside Property Management receives a steady stream of tenant questions through email, phone, website contact forms, and occasional text messages. Many questions are repetitive and policy-based, while others require maintenance triage or staff follow-up.

The strongest first AI opportunity is an AI Tenant Front Desk that answers common tenant questions from approved documents and turns action-oriented conversations into traceable cases for staff review.

RECOMMENDED FIRST BUILD

AI Tenant Front Desk with knowledge-grounded answers and case-based maintenance intake.

This workflow should start small. It should focus on answering common questions, collecting complete maintenance details, preparing summaries, and routing cases to a human for approval. It should not make legal determinations, promise refunds, dispatch vendors automatically, or override staff judgment.

Current-State Workflow

1. Tenant asks a question by email, phone, web form, or text.
2. Office staff decides whether the question is policy-based or action-oriented.
3. Staff searches lease language, FAQs, prior emails, or internal notes.
4. Staff responds manually or asks for more detail.
5. If action is required, staff creates or updates a maintenance request.
6. Follow-up may happen in a separate email thread, property management tool, or phone call.

Observed Friction

- Repetitive tenant questions interrupt staff throughout the day.
- Policy answers require staff to check lease language or internal rules.
- Maintenance requests often arrive without enough detail.
- Urgency is inconsistent because tenants describe issues differently.
- Staff retypes information across email, notes, and property management software.

Business Opportunities

OPPORTUNITY

Tenant Policy Assistant

Answer repeat questions about lease terms, deposits, pets, parking, notice periods, utilities, and move-out procedures.

OPPORTUNITY

Maintenance Intake And Triage

Collect details, ask for photos, determine urgency from approved rules, and create a case summary for staff review.

OPPORTUNITY

Daily Case Review

Summarize new cases, unresolved issues, urgent items, repeated questions, documentation gaps, and follow-up.

Why This First Build Works

The first build should combine two capabilities: knowledge-grounded tenant chat and case creation for requests that require action. This is stronger than adding a generic chatbot because it creates an operational workflow behind the conversation.

EXAMPLE TENANT FLOW

Tenant: My kitchen faucet is leaking under the sink. Is this an emergency? Assistant: This may not be a life-safety emergency, but it should be reported today. I can collect the details your property manager needs and mark it for same-day review.

AI Collects

- Tenant name, unit number, and best contact method
- Location and description of issue
- Whether water is actively leaking
- Whether the shutoff valve was tried
- Photos, if available
- Permission to enter, if relevant

Knowledge And Guardrails

Required For First Build

- Tenant FAQ
- Standard lease template or relevant lease clauses
- Maintenance request procedure
- Emergency maintenance policy
- Security deposit policy
- Move-in and move-out checklist
- Contact and escalation rules
- Approved language for disclaimers and handoffs

The Assistant Can

- Answer common questions from approved documents
- Ask clarifying questions
- Summarize tenant issues
- Suggest urgency based on written rules
- Create a case for staff review
- Draft tenant follow-up language

The Assistant Should Not

- Provide legal advice
- Promise return of deposit funds
- Interpret disputed lease situations as final
- Approve vendor dispatch without staff rules
- Make emergency judgments beyond conservative routing
- Change the system of record without approval

RECOMMENDED HANDOFF LANGUAGE

I can help summarize this and send it for review. A member of the property management team will make the final decision.

Future-State Workflow And Success Metrics

1. Tenant starts chat from website or tenant portal.
2. Assistant determines whether the tenant needs an answer, a case, or a human.
3. Assistant answers simple policy questions from approved knowledge.
4. Assistant creates a case when action is needed.
5. Staff reviews case summary, source references, urgency, and suggested next step.
6. Staff approves, edits, or rejects the suggested action.
7. Resolved cases become part of the searchable business history.
8. Monthly review identifies repeat issues, missing docs, and future automation opportunities.

First 60 Days

- Percent of tenant chats resolved without staff reply
- Number of maintenance cases created with complete intake details
- Average staff review time per case
- Number of repeated questions identified
- Number of documentation gaps found
- Staff confidence rating

First 6 Months

- Reduction in repetitive email or phone questions
- Faster maintenance triage
- More complete case history
- Better FAQ and policy coverage
- Clearer seasonal issue patterns
- New workflow opportunities discovered

Implementation Plan

<p>PHASE 1</p> <p>Knowledge And Workflow Setup</p> <p>Collect documents, define handoff rules, define maintenance intake fields, and create the case schema. 1-2 weeks.</p>	<p>PHASE 2</p> <p>Prototype Build</p> <p>Build tenant chat, connect approved knowledge, add maintenance intake, and add staff review. 2-3 weeks.</p>	<p>PHASE 3</p> <p>Review And Launch</p> <p>Test common and risky questions, review triage examples, tune answers, and launch with a limited entry point. 1-2 weeks.</p>
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Estimate Range

<p>DESIGN BLUEPRINT</p> <p>\$750-\$1,500</p> <p>Fixed fee</p>	<p>FIRST BUILD</p> <p>\$4,000-\$9,500</p> <p>Estimated implementation range</p>	<p>MANAGED IMPROVEMENT</p> <p>\$500-\$1,600/mo</p> <p>Depends on review cadence and support scope</p>
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These ranges are directional and would be finalized after scope, integrations, and required documentation are confirmed.

ProductIntel-Ready Work Items

If Holloway Consulting builds the first workflow, this Blueprint can become structured work immediately.

- Create tenant knowledge base from approved docs
- Define maintenance case schema
- Build tenant chat entry point
- Implement source-grounded answer behavior
- Add emergency and human-handoff rules
- Create staff case review view
- Generate daily property manager summary
- Test lease, deposit, pet, parking, and maintenance scenarios
- Tune responses after first 30 days

RECOMMENDATION

Move forward with the AI Tenant Front Desk as a narrow first build. Start with policy-grounded answers and maintenance case intake. Avoid deep property management software integration until the assistant has proven useful and staff trusts the workflow.

The best first outcome is not full automation. The best first outcome is fewer repetitive questions, better maintenance intake, clearer staff review, and a growing history of tenant needs.