REAL-TIME
CONSULTING SERVICES

AI Chatbot Project

CLIENT PROFILE

- **Location: Riverbank, CA**
- **Industry: 3rd Party Operator (SFR, MF, Commercial)**
- **Portfolio Size: 850 SFR/MF Doors**
- **Employees: 18**
- **Project Duration: 8 weeks**

BUSINESS PROBLEM

A well-established property management company faced persistent challenges in managing internal knowledge sharing and operational efficiency. Their team often struggled to access essential information quickly, leading to delays in decision-making, duplicated efforts, and frequent interruptions in daily operations. This lack of centralized knowledge accessibility resulted in:

- Increased staff frustration from repeated questions and unclear processes.
- Time wasted locating SOPs, key documents, and system-specific data (e.g., tenant details, property records).
- Limited ability to scale operations efficiently without increasing overhead.

Additionally, there were rising concerns about data security and properly handling sensitive property and tenant information.

HOW WE SOLVED IT

AI Chatbot Implementation

We designed and deployed an AI-powered internal chatbot using Botpress, customized to serve as the company's virtual knowledge assistant. This solution seamlessly integrated with their Google Drive, Monday.com, and AppFolio platforms to:

- Centralize and streamline internal knowledge retrieval.
- Handle FAQs and data lookups from various systems.
- Escalate complex queries directly to management for resolution.

The chatbot utilized natural language processing (NLP) to improve staff interactions and continuously learned from user feedback, refining its responses and capabilities over time.

Secure Data Integrations

We implemented secure API integrations across the company's systems, ensuring that:

- Data from Google Drive, AppFolio, and Monday.com was indexed and retrievable via the chatbot.
- Sensitive data remained protected through encrypted channels and escalation safeguards.
- An escalation protocol was established to route unanswered queries to management, ensuring a human review when necessary.

The company now plans to expand chatbot capabilities to include customer support functions, leveraging the same secure framework

AT A GLANCE

CHALLENGES

- Disorganized internal knowledge base.
- Operational inefficiencies and frequent bottlenecks.
- Staff reliant on manual processes for information retrieval.
- Data security concerns around sensitive property and tenant records.

STRENGTHS

- Forward-thinking leadership open to AI adoption.
- Thorough internal documentation (SOPs, processes).
- Diverse tech stack (AppFolio, Monday.com, Google Drive) with integration potential.

RESULTS

- **We delivered staff training via live sessions and Loom walkthroughs, ensuring user adoption and confidence in the tool.**
- **Post-launch, we provided ongoing monitoring and monthly check-ins to track fallback rates, optimize performance, and address any evolving needs.**

We also saw:

- 80% reduction in repetitive internal inquiries within the first month.
- 30% faster response time for staff retrieving SOPs and property data.
- Improved data security with controlled access and escalation protocols.
- Staff reported higher satisfaction due to less interruption and smoother workflows.

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Deb, a self-described "Fixer," specializes in driving growth with lean management. As a fractional implementer, she builds foundational structures, defines roles, sets KPIs, and trains teams to perform at their best. Deb delivers actionable solutions to disrupt markets, boost accountability, and unlock new revenue opportunities, helping businesses break free from complacency and achieve sustainable growth.