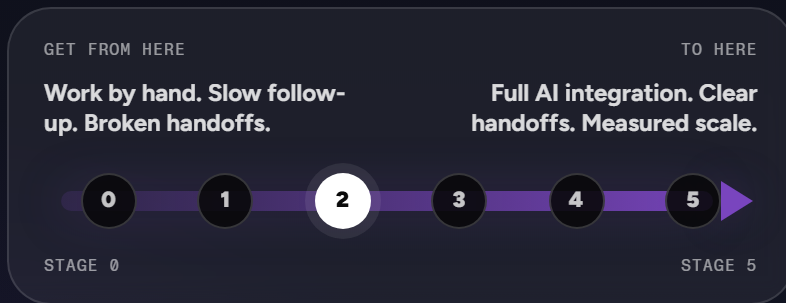


THE WORKFLOW AUTOPILOT ROADMAP

WHAT STAGE IS YOUR BUSINESS IN?

Go from scattered property management work to Workflow AI.

Find it. Fix it. Move up.



THIS IS NOT A TECH SCORE

It is a work score.

Find the stage you are in. Fix that stage first. Then move up with less drag and less guesswork.

0 BY HAND
DOING IT BY HAND

1 TOO SLOW
WORK IS TOO SLOW

2 LEADS
LEADS GO COLD

3 TOOLS
TOOLS DON'T TALK

4 TEAM
TEAM CAN'T KEEP UP

5 SCALE
READY TO SCALE

Find your stage. Fix it first. Move up with less drag.

FIND YOUR STAGE

Start at 0. Read down.

Stop at the first one that feels true.

0

DOING IT BY HAND

Too much leasing, rent, and maintenance work by hand



1

WORK IS TOO SLOW

The work gets done, but residents, owners, or vendors wait too long



2

LEADS GO COLD

Leasing interest comes in, but follow-up is slow



3

TOOLS DON'T TALK

The team lives in AppFolio, Buildium, DoorLoop, Yardi, email, and spreadsheets



4

TEAM CAN'T KEEP UP

Good people are buried in owner updates, vendor follow-up, and cleanup



5

READY TO SCALE

The basics work. Now more doors expose every weak workflow



THE FAST VERSION

The whole roadmap on one page.

See all 6 PM stages fast. Then go to your page.

STAGE	WHAT IT FEELS LIKE	MAIN PROBLEM	GRADUATE BY
<p>STAGE 0</p> <p>DOING IT BY HAND</p>	Too much leasing, rent, and maintenance work by hand	You are the handoff	Make one repeat PM task start on its own
<p>STAGE 1</p> <p>WORK IS TOO SLOW</p>	The work gets done, but residents, owners, or vendors wait too long	Work sits between people	Cut the waits that slow leasing, notices, and maintenance
<p>STAGE 2</p> <p>LEADS GO COLD</p>	Leasing interest comes in, but follow-up is slow	Slow leasing follow-up	Reply, route, and work every leasing lead fast
<p>STAGE 3</p> <p>TOOLS DON'T TALK</p>	The team lives in AppFolio, Buildium, DoorLoop, Yardi, email, and spreadsheets	Double entry and broken PM handoffs	Build one clean flow between your core PM tools
<p>STAGE 4</p> <p>TEAM CAN'T KEEP UP</p>	Good people are buried in owner updates, vendor follow-up, and cleanup	Low-value PM work eats up the team	Free the team from repeat PM work
<p>STAGE 5</p> <p>READY TO SCALE</p>	The basics work. Now more doors expose every weak workflow	More doors break workflows nobody measures	Monitor what works and scale it across more doors

HOW TO USE THIS GUIDE

Find it. Fix it. Move up.

This guide is here to show the next fix.

1

STEP 1

Find your stage.

Pick the first one that feels true.

2

STEP 2

Fix that stage.

Do not skip ahead.

3

STEP 3

Then move up.

Make the next fix only after this one works.

START HERE, NOT HERE

<p style="font-size: x-small; margin-bottom: 5px;">DO NOT DO THIS</p> <p>Buy more tools first.</p>	→	<p style="font-size: x-small; margin-bottom: 5px;">DO THIS</p> <p>Fix the stuck step first.</p>
<p style="font-size: x-small; margin-bottom: 5px;">DO NOT DO THIS</p> <p>Map every edge case.</p>	→	<p style="font-size: x-small; margin-bottom: 5px;">DO THIS</p> <p>Fix the thing that repeats most.</p>
<p style="font-size: x-small; margin-bottom: 5px;">DO NOT DO THIS</p> <p>Try to fix all 6 stages.</p>	→	<p style="font-size: x-small; margin-bottom: 5px;">DO THIS</p> <p>Fix one stage at a time.</p>

LOOK FOR THIS FIRST

Vendor delay

Leasing lag

Missed notice

Tab sprawl

THE ORDER

Find the stuck step

→

Fix the handoff

→

Then add tools

THE POINT

Start with the bottleneck. Not the tool.

STAGE 0

DOING IT BY HAND

Work moves when you touch it. Leasing, notices, and maintenance start in inboxes, texts, or memory.

ROLE

PM operator

TEAM SIZE

1-4 people

MOST WEEKS FEEL LIKE

Too much leasing, rent, and maintenance work by hand

MAIN PROBLEM

You are the handoff

GRADUATE BY

Make one repeat PM task start on its own

FIX THIS STAGE FIRST

Then move up.



LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- Maintenance requests live in email and text.
- Late notices and move-in tasks start by memory.
- People copy the same update between AppFolio, Google Workspace, and spreadsheets.

FIX FIRST

- List the repeat tasks around leasing, notices, and maintenance.
- Pick the one that starts the same way each time.
- Make the first handoff happen without a text, email, or sticky note.

GRADUATE WHEN

- A repeat task starts on its own.
- Residents and vendors get the same update every time.
- You stop doing night cleanup in your inbox.

AI LEVEL 0

No Workflow AI yet

Start small. Let AI help with one PM task. Do not ask it to run a messy workflow.

STAGE 1

WORK IS TOO SLOW

The work gets done. It just moves too slow. Leasing, owner updates, approvals, and vendor follow-up drag out every week.

ROLE

Coordinator

TEAM SIZE

2-6 people

MOST WEEKS FEEL LIKE

The work gets done, but residents, owners, or vendors wait too long

MAIN PROBLEM

Work sits between people

GRADUATE BY

Cut the waits that slow leasing, notices, and maintenance

FIX THIS STAGE FIRST

Then move up.

0

BY HAND

DOING IT BY HAND

1

TOO SLOW

WORK IS TOO SLOW

2

LEADS

LEADS GO COLD

3

TOOLS

TOOLS DON'T TALK

4

TEAM

TEAM CAN'T KEEP UP

5

SCALE

READY TO SCALE

LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- People ask for status all day.
- A work order is ready to move but waits on one person.
- Owners or residents wait because nobody sees the bottleneck fast enough.

FIX FIRST

- Time each handoff in leasing, maintenance, and accounting.
- Find where work sits untouched.
- Add reminders and SLA timers before work goes stale.

GRADUATE WHEN

- Requests move faster each week.
- The team knows where work is without asking.
- Fewer tasks stall halfway through.

AI LEVEL 1

Workflow AI helps with updates

AI can draft updates and summaries here. But the real win is still fewer slow handoffs.

STAGE 2

LEADS GO COLD

Leasing leads come in, but follow-up is slow or uneven. Good renters go cold while the team is busy.

ROLE

Leasing lead

TEAM SIZE

2-8 people

MOST WEEKS FEEL LIKE

Leasing interest comes in, but follow-up is slow

MAIN PROBLEM

Slow leasing follow-up

GRADUATE BY

Reply, route, and work every leasing lead fast

FIX THIS STAGE FIRST

Then move up.

- 0 BY HAND **DOING IT BY HAND**
- 1 TOO SLOW **WORK IS TOO SLOW**
- 2 LEADS **LEADS GO COLD****
- 3 TOOLS **TOOLS DON'T TALK**
- 4 TEAM **TEAM CAN'T KEEP UP**
- 5 SCALE **READY TO SCALE**

LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- New inquiries sit in forms, inboxes, or Buildium/AppFolio leads.
- Different people follow up in different ways.
- Prospects go quiet before a showing gets booked.

FIX FIRST

- Connect every lead source to one place.
- Send a fast first reply.
- Assign a clear owner and next step.

GRADUATE WHEN

- Every leasing lead gets a fast first touch.
- No lead sits with no owner.
- Managers can see response speed.

AI LEVEL 2

Workflow AI helps with leasing follow-up

This is a strong place for AI. Use it to speed leasing follow-up and keep the next step obvious.

STAGE 3

TOOLS DON'T TALK

You have the tools. The problem is the gaps between them. People retype the same info because the system never became one core workflow.

ROLE

Systems lead

TEAM SIZE

3-12 people

MOST WEEKS FEEL LIKE

The team lives in AppFolio, Buildium, DoorLoop, Yardi, email, and spreadsheets

MAIN PROBLEM

Double entry and broken PM handoffs

GRADUATE BY

Build one clean flow between your core PM tools

WHAT THIS LOOKS LIKE

- Different tools show different answers.
- The team builds side spreadsheets to keep up.
- Notices, vendor dispatch, or inspections break when one field gets missed.

FIX FIRST

- Map where data starts, moves, and gets stuck.
- Choose one source of truth.
- Kill double entry first.

GRADUATE WHEN

- Status stays in sync.
- The team trusts what the system says.
- Less work falls between the cracks.

FIX THIS STAGE FIRST

Then move up.

- 0 BY HAND
DOING IT BY HAND
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WORK IS TOO SLOW
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LESS DRAG BEATS MORE TOOLS

AI LEVEL 3

Workflow AI works inside PM handoffs

AI gets stronger here because AppFolio, Buildium, Google Workspace, and your other tools share the same facts.

STAGE 4

TEAM CAN'T KEEP UP

The team works hard. But too much time goes to admin, follow-up, and cleanup. Busy weeks create even more chaos.

ROLE

PM manager

TEAM SIZE

4-15 people

MOST WEEKS FEEL LIKE

Good people are buried in owner updates, vendor follow-up, and cleanup

MAIN PROBLEM

Low-value PM work eats up the team

GRADUATE BY

Free the team from repeat PM work

FIX THIS STAGE FIRST

Then move up.

WHAT THIS LOOKS LIKE

- Good people spend hours chasing vendors and repeating the same updates.
- Residents and owners feel the lag.
- Weeknight cleanup becomes normal.

BY HAND

0 DOING IT BY HAND

TOO SLOW

1 WORK IS TOO SLOW

LEADS

2 LEADS GO COLD

TOOLS

3 TOOLS DON'T TALK

TEAM

4 TEAM CAN'T KEEP UP

SCALE

5 READY TO SCALE

LESS DRAG BEATS MORE TOOLS

FIX FIRST

- Pull repeat work off high-value roles.
- Standardize intake, updates, and routine notices.
- Make a simple path for edge cases and escalations.

GRADUATE WHEN

- The team spends less time chasing details.
- Work keeps moving during busy weeks.
- Residents and owners stop feeling the chaos.

AI LEVEL 4

Workflow AI takes repeat PM work off the team

Use AI to remove repeat PM work, not judgment. The goal is less admin drag, not more software noise.

STAGE 5

READY TO SCALE

The basics work. Now you need visibility, alerts, and room to grow. This is where more doors expose every hidden break.

ROLE

Operator

TEAM SIZE

8-30+ people

MOST WEEKS FEEL LIKE

The basics work. Now more doors expose every weak workflow

MAIN PROBLEM

More doors break workflows nobody measures

GRADUATE BY

Monitor what works and scale it across more doors

FIX THIS STAGE FIRST

Then move up.

- 0 BY HAND **DOING IT BY HAND**
- 1 TOO SLOW **WORK IS TOO SLOW**
- 2 LEADS **LEADS GO COLD**
- 3 TOOLS **TOOLS DON'T TALK**
- 4 TEAM **TEAM CAN'T KEEP UP**
- 5 SCALE **READY TO SCALE**

LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- Automations run but nobody owns them.
- Errors hide until an owner or resident feels them.
- Growth outpaces the way work is documented.

FIX FIRST

- Add alerts when key PM flows break.
- Track time saved, response speed, and completion.
- Expand from proven wins, not random automations.

GRADUATE WHEN

- The system is measured.
- New workflows roll out from a plan.
- You can add doors without guessing.

AI LEVEL 5

Workflow AI helps watch and scale PM ops

Now AI should help monitor the system, flag risk, and scale what already works.

WHAT GOOD LOOKS LIKE

This is what fixed PM work looks like.

Requests start. Updates go out. Nothing falls through the cracks.

1

Requests start fast.

Leasing, notices, and maintenance do not wait in inboxes.

2

Updates go out.

Residents, owners, and vendors get the same next step.

3

The team trusts it.

People stop bouncing between AppFolio, Buildium, DoorLoop, and spreadsheets.

WORK SHOULD MOVE LIKE THIS

1

Request comes in

2

Right person gets it

3

Update goes out

4

Done and logged

IF YOU STILL SEE THIS, IT IS NOT FIXED

Vendor delay

Missed notice

Leasing lag

Owner update chase

Fall through cracks

WHERE AI FITS

AI comes after the workflow.

First make the work clear. Then let AI help.

1

CLEAN THIS FIRST

AI works when these are clear.

Clear trigger

Clear owner

Clear SLA

2. USE AI FOR THIS

Good AI jobs

- Draft owner updates
- Triage maintenance
- Route leasing leads
- Flag missing info

NOT THIS

Do not use AI for this

- Guess lease terms
- Make compliance calls
- Replace the PM
- Hide missed notices

3

ADD AI HERE

Use it at the stage you are in.

STAGE 0-1

Not yet.

If leasing, notices, or maintenance still start by hand, fix that first.

STAGE 2-3

Now it helps.

This is where it can speed leasing follow-up, updates, and handoffs.

STAGE 4-5

Now it can scale.

Now it can take repeat PM work off the team and flag broken workflows.

THE RULE

Fix the workflow first. Then add AI.

FREE PM WORKFLOW AI AUDIT

Want help fixing this?

Short call. Clear plan.



BOOK HERE

workflowautopilot.com/contact

info@workflowautopilot.com

WHO IT IS FOR

For PM teams with 150+ doors and work that feels slow, stuck, or broken.

WHAT YOU GET

A free Workflow AI audit for property managers. We show you what to fix first.

NOT THERE YET?

Under 150 doors? Start with the free content at workflowautopilot.com/learn.

NEXT STEPS

1. Go to workflowautopilot.com/contact.
2. Pick a time on the calendar.
3. We talk through leasing, maintenance, owner updates, and what keeps falling through the cracks.
4. We show you what to fix first.
5. You leave with a clear first move, even if we are not the right fit.

If this feels like you, I look forward to talking to you.

Tyler

This guide is for education. Results depend on your business, effort, skill, team, and execution.