



Tenant communication automation playbook

Checklist for assessing readiness to deploy conversational AI agents
in residential property management

Operational readiness

Readiness Criteria	Yes	No	Notes
We currently receive tenant inquiries across multiple channels (SMS, voice, email, etc.)	☐	☐	
We experience delays or inconsistencies in first responses	☐	☐	
Voicemail and shared inboxes are common communication entry points	☐	☐	
Our front-line teams frequently repeat answers to common questions	☐	☐	
We have documented escalation paths and response SLAs for tenant issues	☐	☐	
After-hours communication is routed through on-call staff or third-party call centers	☐	☐	
We regularly experience “double tickets” or repeated follow-ups from tenants	☐	☐	

Let us help assess your communications automation potential

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Systems & data readiness

Readiness Criteria	Yes	No	Notes
We have a centralized knowledge base or SOP documentation for staff	☐	☐	
Our property data (rules, contact info, booking procedures) is digitized	☐	☐	
We use or plan to use APIs or integrations with property management systems	☐	☐	
We are able to monitor response times and resolution metrics today	☐	☐	
We have documented escalation paths and response SLAs for tenant issues	☐	☐	
We track tenant satisfaction via survey, NPS, or review data	☐	☐	

Scoring Guidance:

10+ “Yes” → Ready to pilot conversational AI agent functionality in select buildings

6–9 “Yes” → Consider limited automation and internal training before rollout

<6 “Yes” → Focus on strengthening communication workflows and data hygiene first

What’s next?

If your readiness score suggests you're in position to move forward, consider:

- Starting with high-frequency, low-complexity communication use cases (e.g., garbage schedules, amenity bookings, door access issues)
- Training conversational AI Agents on building-specific logic before expanding portfolio-wide
- Measuring performance against baseline tenant satisfaction and response time KPIs

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