

DecisionBrief

AI-Enabled Tenant & Prospect Interaction Automation

Executive summary

The firm manages 10 staff and 5,000 tenants across 100 complexes, handling roughly 50 tenant inquiries and 500 prospect inquiries daily. Current processes rely on spreadsheets and email, leading to high manual workload. The goal is to deploy a low-cost, contract-free SaaS that offers 24/7 AI chat and voice agents, with optional lightweight CRM, while ensuring high reliability and minimal hallucinations.

The decision

Adopt an AI-native SaaS solution that meets the firm's budget and reliability requirements, or maintain the current manual process if no suitable solution is found.

Decision maker

Owner/Founder of the property management firm

Situation

The firm has no dedicated maintenance staff and outsources maintenance. Tenant and prospect communications are the primary bottleneck, with 50 tenant inquiries and 500 prospect inquiries per day. Current tools are limited to spreadsheets, email, and Google Docs. The firm seeks 24/7 AI screening via chatbots and voice agents to reduce manual handling and free up staff time.

Desired outcome

Automate initial screening and handling of tenant and prospect inquiries 24/7, reducing manual workload and ensuring timely responses.

Prior experience

- No existing AI or CRM tools; relies on spreadsheets and email

Priorities

- High reliability (≈99% accuracy), 24/7 availability, low cost (<\$100/month), contract-free SaaS, optional lightweight CRM

Constraints

- Budget < \$100/month, no contracts, cloud SaaS, per firm licensing (seats irrelevant)

Options considered

- Do nothing / Keep current system
- Adopt a low-cost AI SaaS with 24/7 chat/voice agents and optional CRM
- Adopt a higher-cost AI SaaS that guarantees higher accuracy
- Negotiate a short trial period before full commitment

Tradeoffs

- Higher cost may improve accuracy but exceed budget
- Short trial may delay full deployment
- Adding a CRM adds complexity but may streamline data management
- Maintaining manual processes preserves control but continues high workload

Risks and concerns

- AI hallucinations leading to tenant/prospect frustration
- Unproven market presence of new AI solutions
- Potential data privacy issues with cloud SaaS
- Limited integration with existing spreadsheets

Unknowns

- Exact monthly cost of potential solutions
- Specific accuracy metrics of candidate AI platforms
- Data integration requirements with existing spreadsheets
- Trial period length and terms

Decision criteria

- Reliability/accuracy ($\approx 99\%$ or higher)
- Cost within budget ($< \$100/\text{month}$)
- Contract flexibility (no long-term commitments)
- Availability of 24/7 chat and voice support
- Optional lightweight CRM functionality

Next steps

- 1. Identify 3–5 candidate AI SaaS vendors that offer 24/7 chat/voice agents and fit the budget. 2. Request free trial access (1–2 months) and evaluate accuracy and reliability. 3. Assess integration effort with current spreadsheet data and potential CRM migration. 4. Compare trial results against decision criteria and select the best fit. 5. Implement chosen solution and monitor tenant/prospect satisfaction post-deployment.

Recommendation

Proceed with a short trial of a low-cost AI SaaS that offers 24/7 chat and voice agents, ensuring it meets the reliability threshold. If the trial confirms high accuracy and low cost, adopt the solution; otherwise, continue with the current manual process.

This Decision Brief reflects the information provided during the interview. It does not independently verify external facts.