

A JAYSON FORDE OPERATIONAL BLUEPRINT



Bridge Property

Field Operations, SOP & Governance System

Designed & Created by **Jayson Forde**

The repeatable field playbook for launching performance improvement, closing revenue-retention leaks, and building high-functioning site teams, with AI-enabled collaboration built in.

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AT A GLANCE

Executive Summary

This is the master field playbook I bring into each facility, a repeatable system to diagnose a site, launch performance improvement, close revenue-retention leaks, and build a team that sustains the gains across the performance year.

THE ENGAGEMENT AT A GLANCE	
Purpose	Launch performance improvement at a facility, uncover team and revenue-performance leaks and gaps, and build a high-functioning team for sustained annual performance.
Operating Model	Diagnose the team and the numbers, expose the leaks to the site, install a new operating standard with real accountability, then embed AI-enabled collaboration so the improvements hold after launch.
Core Outcome	Stop revenue-retention leaks at their operational source, recover the renewals that were slipping, and leave a team and system that sustains performance at scale.
Governance Model	Response-time standards, follow-up reporting to site and operations management, and weekly performance summaries that make accountability visible and measurable.
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OPERATING PRINCIPLE

Most revenue-retention leaks are not pricing problems. They are operational ones, caused by weak collaboration, slow response to accounts, unresolved complaints, and teams that were never fully trained or held accountable. **Fix the operation, and the revenue follows.**

The field sequence

Each facility launch moves through five phases. The nine workstreams that follow map onto this arc.

1 · DIAGNOSE Assess Team, managers, and KPI/account data to find where performance and revenue leak.	2 · EXPOSE Present Show the gaps and revenue leaks to the team and management, with the data.	3 · INSTALL Standardize Roll out SOPs, response-time standards, and accountability reporting.	4 · ENABLE AI Hub Stand up the AI collaboration hub so communication and urgent items flow through one system.	5 · SUSTAIN Own It Assign ownership, recover distressed accounts, and train the team so gains hold.
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— THE ENVIRONMENT

Built for Scale & Real-Time Pressure

This blueprint was forged in a demanding operating environment and is built to hold up in it, high-risk accounts, multi-site scope, and executive-level scrutiny, all managed in real time as the leader on the ground.

DIMENSION	OPERATING SCOPE	WHAT THE BLUEPRINT HANDLES
Portfolio scale	150+ account SaaS-enabled portfolio on the Yardi platform	Consistent workflow architecture and service standards across the book
Site footprint	Four multifamily communities, 600 to 1,000 active accounts	A repeatable launch run at each site, not a one-off fix
Team span	Cross-functional teams of up to 50 per location	Leasing, accounting, and property-management alignment under one standard
Risk profile	High-risk accounts, complex escalations, compliance exposure	Stabilization, recovery, and a governance layer that holds the line

THE OPERATOR'S EDGE

The core capability behind this blueprint is the ability to **see the operational gaps and revenue leaks in the data, build the operating plan around them, and execute it in real time**, as leader, manager, and executive at once. The sections that follow are that system, made repeatable.

The intelligence layer: reading the numbers

Diagnosis runs on real data, not impressions. Executive MBR and QBR reviews, built on Yardi and SaaS analytics, KPI reporting, and AI-assisted insights, surface where account health is slipping and where revenue is leaking, so the operating plan targets the true source, not the symptom.

- ◆ Executive MBR/QBR reviews translate raw platform data into decisions leadership can act on.
- ◆ KPI and operational metrics expose escalation volume, service failures, and renewal risk early.
- ◆ AI-assisted insight turns scattered account signals into a clear, prioritized picture of the leak.

GUIDE

How to Use This Playbook

This document is designed as both a diagnostic engagement plan and a working operating manual for the site team and management.

- ◆ **Operations leadership** uses the field sequence and workstreams to run a full facility launch.
- ◆ **Site managers** use the SOP, accountability, and reporting sections as the daily operating standard.
- ◆ **The team** uses the AI collaboration hub and generative-AI SOPs as their everyday way of working.
- ◆ **Everyone** uses the response-time standards and weekly reporting to make accountability visible.

CONTENTS**01 Retrain for Collaboration**

Surface and close the communication and hand-off gaps where accounts fall through the cracks.

02 Assess Each Team Member

One-on-one diagnosis and a personal workflow support plan to rebuild confidence and performance.

03 Assess the Lead Managers

Evaluate management style and team-building ability, and coach where it is missing.

04 Find the Revenue Leaks

Analyze account health, tickets, and complaints to trace where retention leaks originate.

05 New SOPs & Accountability

Response-time standards, follow-up reports, and weekly summaries that make accountability visible.

06 AI Collaboration Hub

A central NotebookLM hub and per-person workspaces for streamlined, accountable communication.

07 Generative AI in the SOPs

AI built into email, contracts, marketing, meeting notes, and reminders, with human approval.

08 Recover Distressed Accounts

Work long-standing complaints, resolve them, and secure the annual renewal.

09 Ownership & Training

Assign an owner for retention at scale and build a training program for the core team.

— THE DIAGNOSIS

Where Performance & Revenue Leak

The issue is rarely a single under-performer. The larger issue is operational: broken collaboration, slow response, unresolved complaints, and teams never fully trained or held accountable. This diagnosis maps each gap to its revenue impact and the response that closes it.

PROBLEM AREA	LIKELY REVENUE IMPACT	PLAYBOOK RESPONSE
Weak collaboration & hand-offs	Accounts fall through the cracks; issues get dropped between people and shifts	Retrain on a clear communication standard and a shared update system (WS 01, 06)
Individual performance gaps	Inconsistent output and slow work drag site performance	One-on-one assessment and a personal workflow support plan (WS 02)
Under-developed managers	A whole team underperforms beneath a manager who can't build them	Assess management style and install team-building strategies (WS 03)
Slow account response	Complaints and tickets age into cancellations and lost renewals	Response-time standards with logged follow-up (WS 05)
Unresolved complaints	Long-standing issues quietly end in non-renewal	Distressed-account recovery to win back the contract (WS 08)
No accountability rhythm	No one sees the leak until the revenue is already gone	Weekly reporting and a KPI cadence for visibility (WS 05)

WHAT THE DATA REVEALS

Account health, open tickets, complaints, and recurring issues are read together to trace where retention leaks originate, usually slow response, unresolved complaints, or broken hand-offs. The findings are presented to the team plainly, with the data, alongside the plan built to stop the leak.

01 DIAGNOSE

Retrain the team to close collaboration gaps

Broken collaboration is where accounts fall through the cracks and revenue quietly leaks. The first move is to surface where the team fails to communicate and hand off work, then reset the standard.

- ◆ Observe how information moves today, between team members, between shifts, and between the team and management.
- ◆ Identify the hand-off points where updates get lost, duplicated, or delayed.
- ◆ Retrain on a clear communication standard: who updates what, where it lives, and when.
- ◆ Reset the expectation that collaboration is a job requirement, not a courtesy.

02 DIAGNOSE

Assess each team member one-on-one

Individual meetings uncover the real performance issues, the struggles, blockages, and confidence gaps a group setting hides.

- ◆ Meet each team member individually to understand their role, obstacles, and where they feel stuck.
- ◆ Identify performance issues, skill gaps, and blockages holding them back.
- ◆ Build a workflow support action plan for each person, targeted at their specific gaps.
- ◆ Use the plan to rebuild individual confidence and lift performance, which lifts the site.

03 DIAGNOSE

Assess the lead managers

A site rarely outperforms its manager. This workstream evaluates whether the lead can diagnose, motivate, and build their team, and fills the gap where they cannot.

- ◆ Uncover the manager's own operational blockages and how they see their team's struggles.
- ◆ Assess their management style and their ability to motivate and develop people.
- ◆ Where a manager lacks team-building training, coach them directly.
- ◆ Install high-functioning-team strategies the manager can run themselves after launch.

04

DIAGNOSE & EXPOSE

Analyze KPI & account data to find the leaks

The data does the talking. Account health, tickets, complaints, and recurring issues reveal exactly where revenue is leaking, and why, then it is presented to the team with the plan to stop it.

— THE GOVERNANCE STANDARD

SOPs & the Accountability System

New expectations only work when they are specific, measured, and reported. These standards make accountability visible, for the team and for management.

STANDARD	EXPECTATION	WHY IT MATTERS
Complaint response	Respond within 48 hours; every response logged	Stops complaints from aging into cancellations
Ticket response	Respond to ticket support within 24 to 48 hours	Keeps account issues from becoming churn drivers
Follow-up report	Presented to the lead site manager and operations manager	Proves adaptation is followed and lets success be measured
Weekly summary	Progress, new applications, follow-up counts, pending applications, move-ins	Gives management a real basis to assess the team and scale

WHY THIS WORKS

It holds team members accountable to show up in a performing manner, and it gives lead management a real basis to assess the team and scale what works. **Accountability becomes visible, not assumed.**

06

ENABLE

The AI note-collaboration hub (NotebookLM)

This is what makes the new system stick after launch. A central, AI-enabled hub replaces scattered notes and forwarded messages with one place the whole team works from.

- ◆ Stand up a central update location where all team updates live, so communication is streamlined and nothing is lost.
- ◆ Give each team member their own NotebookLM workspace to capture, organize, and automate daily and weekly notes.
- ◆ Let managers review all notes in a consistent analysis framework, hold everyone accountable, and spot exactly where a report is dragging.
- ◆ Create an urgent ticket-and-complaint folder visible to the whole team and management, for a fast, accountable response.

07

ENABLE

Generative AI built into the daily SOPs

Beyond the note hub, generative AI is built into the team's everyday work to remove manual drag, always with a human reviewing before anything reaches a client or resident.

TASK	AI ROLE	HUMAN GATE
Client email responses	Draft fast, consistent, professional replies to residents and clients	A team member reviews and sends
Contract review	Surface key terms, dates, and issues	A person confirms before action
Marketing creative	Produce campaign copy and creative for the site	Reviewed before publishing
Meeting notes	Summarize into clear action items and decisions	Owner confirms the actions
Core reminders	Drive reminders for recurring commitments that slip	Owner acts on the prompt

GOVERNANCE LINE

AI drafts and prepares; a person always reviews and approves anything client-facing. **Speed on the inputs, human judgment on the output.**

08

SUSTAIN

Recover distressed & long-standing accounts

Old and long-standing complaints are where renewals are lost. This workstream works them directly to win back the annual contract.

- ◆ Review old account complaints and long-standing unresolved issues.
- ◆ Determine why each account chose not to renew their contract with the site.
- ◆ Resolve the underlying complaint and rebuild the relationship.
- ◆ Secure the annual renewal contract where it can still be saved.

09

SUSTAIN

Assign ownership & build the training program

Improvement fades without an owner. This names a person to carry retention forward, trains them, and closes the team's capability gap for good.

- ◆ Assign a team member to own the ongoing flow of fixing distressed accounts and retaining renewals at scale.
- ◆ Train them in stakeholder and client-relations methodology, communication, empathy, and listening.
- ◆ Create a training program for all in-office and core employees who need performance improvement.
- ◆ Tie the training to the facility's quarterly performance and annual revenue-retention goals.

STAKEHOLDER & COMPLIANCE GOVERNANCE

Holding the Line Across Stakeholders

At scale and under risk, revenue is also protected upstream, by managing compliance and the web of stakeholders that surround a high-risk site. This governance layer runs alongside the nine workstreams.

STAKEHOLDER / RISK	THE EXPOSURE	HOW THE BLUEPRINT MANAGES IT
Municipal & regulatory	City inspectors, state representatives, and regulatory agencies can halt or penalize operations	Active compliance programs, remediation coordination, and steady stakeholder communication
Executive & regional leadership	Leadership needs true visibility into performance and risk	Executive MBR/QBR reviews with KPI reporting and AI-assisted insight
Vendors & contractors	Remediation and service work depend on coordinated execution	Managed remediation efforts and clear operational ownership
High-risk accounts	Complex escalations and service failures drive churn and exposure	Stabilization and recovery workstreams tied to renewal outcomes

PROOF OF IMPACT

What the System Produces

Run as designed across a 150+ account portfolio and four communities, this operating blueprint has driven measurable, real-time results, the outcome of reading the data, building the plan, and executing it as a leader on the ground.

SITE INTERVENTIONS 40% ROI and MRR improvement delivered through operational site interventions.	RENEWAL RETENTION +60% Increase in account renewal retention across the portfolio.	CHURN REDUCTION 10% »» Churn cut down from a 10% baseline through the operating standard.
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— THE OBJECTIVE

What This Playbook Delivers

Run end to end, this blueprint turns a leaking, under-collaborating site into an accountable, high-functioning operation: teams that communicate, managers who build people, accounts that get fast responses, complaints resolved before they become cancellations, and a reporting rhythm that keeps everyone honest.

It works because it is not a set of ideas, it is an operating system run in real time by a leader who reads the data, builds the plan around the true source of the leak, and executes across the team, the managers, the accounts, and the stakeholders at once. Diagnose, expose, install, enable, sustain. Then hand it off with an owner and an AI-enabled system that keeps it running.

THE RESULT I DRIVE TOWARD

Stop the revenue-retention leak at its operational source, recover the renewals that were slipping, and leave behind a team and an AI-enabled system that **sustains the gains long after the launch.**