EQUIPPED

Property Management Technology

Operations Strategic Briefing

Diagnosis, Framework & 30 / 60 / 90-Day Roadmap

Executive Overview for Leadership Review

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Purpose: A strategic overview of the operational gaps, the systems that close them, and the roadmap to build them before go-live.

Scope note: This briefing presents the strategy and roadmap. The detailed operating systems, SOPs, and build-ready procedures are produced as the deliverables of the engagement.

Confidential — Prepared for Leadership Discussion

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How to Read This Briefing

This document is an executive briefing, not the full operational build. Its purpose is to align leadership on three things before the engagement begins:

1. **The diagnosis —** where Equipped is operationally exposed today, and what that exposure costs in recurring revenue.
2. **The framework —** the five operating systems that close those gaps, explained at a strategic level.
3. **The roadmap —** the 30/60/90-day sequence in which those systems get built, tested, and made transferable.

> **What is, and isn't, in this document**
>
> **Included:** the strategy, the diagnosis, the system frameworks, the roadmap, and the success metrics — everything needed to evaluate the approach and the value.
>
> **Delivered during the engagement:** the build-ready detail — full workflows, SOP library, ticket-system configuration, escalation procedures, QA checklists, and new-hire onboarding standards. These are the work product of the role, marked throughout with a clearly labeled engagement-deliverable note.

1. Executive Summary

Equipped is a pre-launch B2B SaaS proptech platform that helps landlords manage rentals through a single app: tenant screening, rent collection, maintenance coordination, contractor sourcing, and financial reporting. Revenue is a tiered monthly subscription — Starter ($39, up to 10 properties), Professional ($120, up to 50), and Enterprise ($399, unlimited). That recurring-revenue model is the single most important fact about the business: the company does not win at the sale, it wins every month a client stays and grows.

This reframes operations entirely. In a recurring-revenue business, operations is not back-office support — it is the function that protects and grows the revenue base. Every section of this briefing traces back to defending and expanding that monthly recurring revenue (MRR) and the annual recurring revenue (ARR) it compounds into.

As the founding operations hire, I am joining before any internal operational structure exists. Engineering is in place, a salesperson is onboard, and a customer service hire is planned. There is currently no defined path from a sold account to a healthy, retained one; no early-warning system for accounts at risk; no support ticket operation; and no revenue-retention motion. This briefing shows what those systems are, why they matter to revenue, and the order in which I would build them.

The Five Systems This Engagement Builds

System	What It Does	Revenue It Protects
Client Account Workflow	Carries every new account from sold →	Stops sold accounts from

System	What It Does	Revenue It Protects
	onboarded → activated → healthy.	quietly failing to activate (the #1 early-churn cause).
Risk-Flag & Health System	Scores every account and flags risk before it becomes churn.	Converts surprise cancellations into saved accounts.
Support Ticket Operation	Tracks every request from intake to resolution with SLAs.	Protects trust during the fragile launch window.
Revenue Retention Plan	Account management, book-of-business cadence, MRR/ARR tracking.	Grows revenue from existing accounts before any new sale.
SOPs & Hiring Standards	Makes the operation repeatable and transferable to new hires.	Turns one person's competence into durable infrastructure.

The One-Sentence Goal

Turn Equipped from a product with no operational backbone into a company where every client account is owned, every risk is flagged before it becomes churn, every support request is tracked to resolution, and every dollar of recurring revenue is actively defended and grown.

2. The Strategic Insight

Before the diagnosis, one framing point that shapes everything else — because it is the gap most early proptech teams miss.

Downloads vs. Clients

It is natural to think of an app-based product as something people download and use on their own. But Equipped's customers are landlords running real businesses on the platform — collecting rent, managing tenants, coordinating repairs. They are not casual users; they are clients trusting the company with their income and their properties.

That distinction changes the operating model completely. Self-serve users churn quietly and you accept it. Clients running their business on your platform need engagement, monitoring, and relationship management — because when they leave, they take recurring revenue with them, and because a healthy, supported client is the one who upgrades tiers as their portfolio grows.

The entire operational structure in this briefing is built on treating account holders as managed clients, not anonymous downloads. That is where retention revenue is won or lost.

Everything that follows — the lifecycle workflow, the health monitoring, the account-management cadence — is the operational expression of that one strategic shift.

3. Current-State Diagnosis

This is the operational baseline today — stated plainly, because the value of the engagement is measured against this starting point. The intent here is not criticism; it is opportunity. Pre-launch is the ideal moment to install these systems, because there is no legacy chaos to unwind and no paying customers being affected while the foundation is built.

Organizational Reality

Function	Status Today	Operational Implication
Operations	First hire. No structure, SOPs, or tooling decisions yet.	Everything operational is designed from zero — a chance to build it right.
Engineering	Onboard and building the product.	Operations becomes the bridge between customer-reported issues and the eng backlog.
Sales	One person in seat.	A defined sales → onboarding handoff is needed so closed deals become active, healthy, paying accounts.
Customer Support	Hire planned.	Operations will define the support system this person runs inside — and likely onboard them.
Product	Pre-launch.	The ideal window to install systems before paying customers arrive.

The Cost of the Gaps

Each gap below is named with the revenue consequence of leaving it unaddressed — because in a recurring-revenue business, operational gaps are revenue leaks.

The Gap	If Left Unaddressed
No sold-to-activated workflow	Accounts pay but never fully adopt the platform — they churn within 1–2 billing cycles. Revenue won, then lost.
No account-health signal	The first sign a client is unhappy is their cancellation — the most expensive possible way to learn it.
No support ticket system	Requests arrive scattered across email, phone, and chat, get lost, and erode trust during launch.

The Gap	If Left Unaddressed
No retention motion	Accounts are left alone until they leave; no expansion revenue is captured as portfolios grow.
No documented operations	Operational knowledge lives in one person's head — the company cannot scale or absorb a departure.

Why This Is an Opportunity, Not a Problem

Installing these systems pre-launch costs a fraction of retrofitting them after onboarding hundreds of accounts. The 90-day plan is timed so the operation is built and tested before the first wave of paying customers — meaning Equipped launches proactive, not scrambling. The gaps above are exactly the upside this engagement captures.

4. The 30 / 60 / 90-Day Roadmap

The roadmap is sequenced by leverage, not by topic. Each phase has a theme and a clear mission. The detailed milestones and the systems built in each phase are summarized here; the full build specifications are produced as engagement deliverables.

Phase	Theme	Mission
Days 1–30	Listen, Map & Stabilize	Understand the business, document current state, choose tooling, and stand up the two most urgent systems.
Days 31–60	Build & Systematize	Construct the full client-account, risk, and support systems; launch the retention motion.
Days 61–90	Scale, Test & Hand Off	Stress-test the systems, finalize SOPs, and train new hires to operate inside them.

Phase 1 — Days 1–30: Listen, Map & Stabilize

As the first hire, the priority is understanding how the business actually works before building, then standing up the highest-leverage systems immediately. Focus areas:

- Discovery and stakeholder alignment with founders, engineering, and sales.
- Tooling-stack decision — selecting the system of record for accounts, tickets, and documentation.
- First map of the client lifecycle, from lead through renewal.
- A single support intake channel, live, so no request is lost from day one.
- An agreed format for reporting platform issues to engineering.

Phase 1 Outcome

Leadership ends month one with a validated map of how the business works, the operational tooling chosen, and the two most urgent systems — support intake and a first client-onboarding path — already standing.

Phase 2 — Days 31–60: Build & Systematize

The maps from Phase 1 become full operating systems. Focus areas:

- The complete new-client account workflow, sold through activated.
- The risk-flag and account-health system, with scoring and escalation.
- The full support ticket operation, with triage, priority tiers, SLAs, and a quality loop.
- The revenue-retention plan, including account-management cadence and an MRR/ARR view.
- A recurring quality-assurance routine for the core platform flows.

Phase 2 Outcome

By day 60, a new client can be run end-to-end through the workflow, every account carries a health status, support runs with measurable SLAs, and a retention dashboard tracks the revenue numbers that define company health.

Phase 3 — Days 61–90: Scale, Test & Hand Off

The systems are proven under realistic load and made transferable, so the operation does not depend on any single person. Focus areas:

- End-to-end stress test of the full lifecycle, logging and fixing every break point.
- A complete, versioned SOP library.
- A new-hire onboarding standard — first proven by onboarding the customer-support hire.
- A standardized contractor and vendor management process.
- A recurring operations and revenue reporting cadence, including a Quarterly Business Review template.

Phase 3 Outcome

The company reaches go-live with a tested operation, a complete SOP library, and a proven path to onboard future hires — operations that scale beyond the founding hire.

5. System — Client Account Workflow

The spine of proactive operations: a defined path every new landlord account travels, from the moment sales closes the deal to a fully onboarded, actively-using, healthy account. Its purpose is to eliminate the gap where sold accounts quietly fail to activate — the single biggest cause of early recurring-revenue loss.

The Lifecycle, at a Glance

Stage	What Happens	Why It Matters to Revenue
1. Handoff	Sales transfers the closed account into operations with full context.	Nothing is dropped between the sale and onboarding.
2. Welcome & Kickoff	The client is welcomed and success criteria are set.	The relationship starts as a managed client, not a download.
3. Onboarding	The account is configured and set up to use the platform.	Speed to setup protects the revenue already won.
4. Activation	The client completes their first real value action.	Activation is the strongest predictor of retention.
5. Account Management	Ongoing health monitoring and check-ins begin.	Keeps the account healthy and surfaces expansion.
6. Renewal / Expansion	Usage is reviewed; renewal secured, upgrades surfaced.	Where retained and expanded revenue is captured.

The Key Strategic Point

An account is never considered “successfully onboarded” until the client has experienced real value — the activation milestone. Most early SaaS churn comes from accounts that pay but never truly activate. Making activation an explicit, owned stage is how that revenue is protected.

▶️ Detailed build delivered during engagement

The complete, build-ready client account workflow — procedures, templates, checklists, and configuration — is constructed and documented as a core deliverable of the engagement. At the strategy stage, the framework and intent are summarized above. The operational build includes:

- Stage-by-stage procedures with named owners and handoff criteria.
- The full onboarding checklist clients are run through.
- Sales-to-operations handoff template and required fields.
- Activation definitions and the trigger that marks an account live.
- Templates for welcome, kickoff, and check-in communications.

6. System — Risk-Flag & Account-Health

Proactive operations means an account never churns as a surprise. This system gives every account a health status and defines the signals that move it — converting gut feel into a repeatable early-warning system that protects recurring revenue.

The Health Model, at a Glance

Status	Meaning	Strategic Response
GREEN	Healthy and active — using the platform, paying on time.	Maintain cadence; look for expansion opportunities.
YELLOW	At risk — declining usage, repeated issues, or stalled onboarding.	Proactive outreach and a recovery plan before churn.
RED	Critical — inactive, payment failure, or a cancellation signal.	Immediate escalation and a save play; leadership informed.

The system watches for specific early-warning signals — stalled onboarding, usage drops, payment failures, repeated support friction, negative sentiment, and unresponsiveness — and routes each flagged account through a defined escalation path so risk is acted on, not noticed too late.

▶️ **Detailed build delivered during engagement**

The complete, build-ready risk-flag and account-health system — procedures, templates, checklists, and configuration — is constructed and documented as a core deliverable of the engagement. At the strategy stage, the framework and intent are summarized above. The operational build includes:

- The full health-scoring method and the thresholds for each status.
- The complete set of early-warning triggers and how each is monitored.
- The L1–L3 escalation path with owners and response targets.
- Save-play procedures for at-risk and critical accounts.
- Configuration of whatever signals current tooling and product analytics can track.

7. System — Support Ticket Operation

A single, tracked path for every customer request — a landlord's payment question, a tenant's maintenance issue, a reported bug. This replaces scattered, reactive support with a measurable operation the incoming support hire can run inside, protecting customer trust during the fragile launch window.

The Flow, at a Glance

Step	What Happens
1. Intake	Every request funnels into one channel and becomes a tracked ticket.
2. Triage	Each ticket is categorized and assigned a priority.
3. Route	Resolved directly, or routed — bugs to engineering, account risk to the health system, billing to finance.
4. Resolve	The fix is actioned and clearly communicated to the requester.
5. Close & QA	The ticket is closed, logged, and sampled for quality and patterns.
6. Feedback Loop	Recurring issues feed SOP updates, the product backlog, and risk flags.

Every ticket carries a priority tier with a defined response and resolution target, so support is measurable from day one rather than improvised. Volume, responsiveness, quality, and recurring-issue patterns are tracked as standing metrics.

▶️ **Detailed build delivered during engagement**

The complete, build-ready support ticket operation — procedures, templates, checklists, and configuration — is constructed and documented as a core deliverable of the engagement. At the strategy stage, the framework and intent are summarized above. The operational build includes:

- Ticket system configuration, categories, and intake templates.
- Priority-tier definitions with first-response and resolution SLAs.
- The bug / engineering hand-off template and severity tiers.
- The quality-assurance loop and the support metrics dashboard.
- The runbook the support hire operates inside.

8. System — Revenue Retention & Growth

Because Equipped earns tiered MRR, retention is the engine of the business: keeping and expanding existing accounts compounds far more cheaply than constantly replacing churned ones. This is the system that most directly converts good operations into revenue growth.

The Revenue Metrics Operations Owns

Metric	What It Measures	Why Operations Drives It
MRR	Monthly recurring revenue.	Onboarding speed and activation drive how fast new MRR turns on.

Metric	What It Measures	Why Operations Drives It
ARR	Annual recurring revenue (MRR × 12).	Retention determines how much MRR survives into durable ARR.
Churn	Revenue lost to cancellations/downgrades.	The risk-flag system exists to drive this down.
Net Revenue Retention	Existing-account revenue including expansion, net of churn.	Account management pushes this above 100%.

The Retention Motion, at a Glance

Once activated, every account is actively managed rather than left alone until renewal, with the depth of attention scaled to account value:

- **High-value accounts (Enterprise tier) —** the closest relationship, regular check-ins, and Quarterly Business Reviews that demonstrate value and secure renewal.
- **Mid accounts (Professional tier) —** periodic health reviews focused on usage and readiness to upgrade as portfolios grow.
- **Volume accounts (Starter tier) —** lightweight, partly automated touchpoints, with proactive outreach triggered by health flags.

This “book of business” approach — treating the full set of accounts as a managed portfolio with scheduled and trigger-based communication — is the operational discipline that turns one-time sales into compounding, growing recurring revenue.

The Retention Operating Principle

Retention is engineered, not hoped for. The health model flags risk early, the account-management cadence keeps every relationship warm, and the review-and-expansion motion turns healthy accounts into growing ones. Together they target net revenue retention above 100% — meaning the existing customer base grows revenue before a single new sale closes.

▶️ Detailed build delivered during engagement

The complete, build-ready revenue retention system — procedures, templates, checklists, and configuration — is constructed and documented as a core deliverable of the engagement. At the strategy stage, the framework and intent are summarized above. The operational build includes:

- The account-management cadence calendar by segment.
- The book-of-business communication plan (scheduled, trigger-based, value, and renewal touches).
- The Quarterly Business Review template and agenda.
- The MRR / ARR / churn / retention dashboard.

- Upgrade and expansion plays tied to account-health signals.

9. System — SOPs & Hiring Standards

The final system is what converts individual competence into institutional infrastructure. As the company grows from one operations person to a team, every new hire and contractor should become productive by following a documented standard — not by absorbing knowledge informally. This is what makes the operation durable and scalable.

What This Establishes

- **A complete SOP library —** every core process documented in a consistent, teachable format and kept in one searchable place.
- **A new-hire onboarding standard —** a structured ramp that takes a new operations or support hire from day one to fully productive, first proven on the incoming support hire.
- **A contractor and vendor management standard —** a documented process for vetting, onboarding, and tracking the contractor network that maintenance coordination depends on.

The Operating Standards Every Hire Is Held To

1. Nothing gets lost — every request, account, and risk lives in a system, not someone's memory.
2. Proactive over reactive — we reach out before clients complain and flag risk before it becomes churn.
3. Documented and repeatable — if you do it twice, it becomes an SOP.
4. Measured — every process has a metric and a target.
5. Customer trust is the product — especially at launch, how we handle issues is the brand.

▶️ Detailed build delivered during engagement

The complete, build-ready SOP library and hiring standards — procedures, templates, checklists, and configuration — is constructed and documented as a core deliverable of the engagement. At the strategy stage, the framework and intent are summarized above. The operational build includes:

- The full SOP library covering every core process, in a versioned format.
- The new-hire onboarding path and training materials.
- The contractor / vendor onboarding and management standard.
- Role definitions and operating standards for future operations hires.

10. How Success Will Be Measured

The engagement is accountable to clear outcomes. These are the metrics the operations function will report against — grouped by what they protect.

Operational Outcomes

Metric	Target Direction
Onboarding time (sold → activated)	Down
Activation rate (sold accounts reaching first value)	Up
Support response & resolution vs. target	Meet / beat target
% of accounts with a current health score	Toward 100%
Risk flags resolved within target	Up

Revenue Outcomes

Metric	Target Direction
MRR	Up month-over-month
ARR	Up
Gross revenue churn	Down
Net revenue retention	Above 100%
Expansion revenue (tier upgrades)	Up

In Summary

This briefing lays out the strategy: the recurring-revenue lens, the diagnosis of where Equipped is exposed, the five systems that close those gaps, and the 30/60/90 roadmap to build them before go-live. The detailed operating systems and SOPs — the build-ready work product — are produced as the deliverables of the engagement. The next step is to align on which areas to prioritize and move forward together.