

A JAYSON FORDE OPERATIONAL BLUEPRINT

STRATEGIC
EXECUTIVE

Regional Operations & Team Development

The Strategic Executive Playbook for Field Ops, Team Transformation & Performance Recovery

Designed & Created by **Jayson Forde**

How I enter a regional portfolio or multi-site operation, establish a measurable baseline, retrain managers and teams, rebuild SOP discipline, and govern adoption to revenue. A portable executive playbook for any proptech, regional real-estate, or large-team environment.

Jayson Forde

Regional Operations · Team Retraining · SOP Governance ·
Revenue Performance

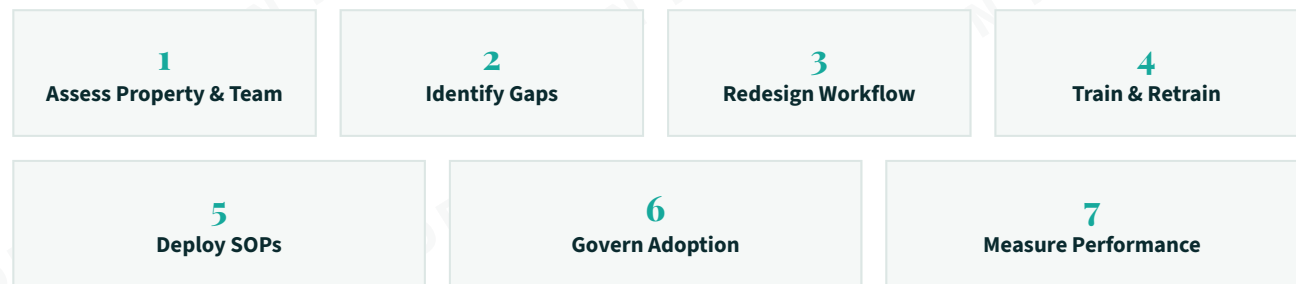
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EXECUTIVE OVERVIEW

Field Operations Transformation, End to End

This framework is how I approach regional operations transformation across properties, portfolios, and multi-site teams: assessing operational performance, retraining managers and office teams, rebuilding SOP discipline, strengthening relationship and account management, and governing adoption through structured reporting and accountability.

THE TRANSFORMATION CYCLE



THE OPERATING APPROACH

Assess the property and team. Identify the gaps. Redesign the workflow. Train the manager, retrain the team, deploy the SOPs. Then govern adoption and measure performance, **because implementation cannot be assumed, it has to be proven.**

WHAT THIS PLAYBOOK SOLVES

The Operating Problems

- Insufficient office-team training and inconsistent manager-led development.
- Weak relationship management, lead follow-up, account follow-up, and return-call discipline.
- Poor use of operational tools and inconsistent progress reporting.
- Gaps in lead tracking, data interpretation, closing, renewals, retention, and account management.
- Weak coordination around unit readiness, move-ins, transfers, escalations, and customer experience.
- Low visibility into whether new SOPs and workflows are actually being adopted.

EVIDENCE BOUNDARY

Historical facts are anchored to the documented resume record; the operating methodology, tools, and demonstration data are formalized reconstructions of the repeatable methods used in the field. **No property names, confidential financial results, employees, or proprietary records are represented.**

EVIDENCE TYPE	USE
Historical Facts	Role scope, responsibilities, systems, team and portfolio scale, and reported aggregate outcomes, anchored to the resume record.
Reconstructed Methodology	Formalized representation of the repeatable methods used to assess, train, govern, and improve regional teams.
Templates & Scorecards	Portfolio-ready tools reconstructed from the operating method, ready to apply in a new environment.

SECTION 01 · PROPERTY TAKEOVER & 90-DAY LOGIC

Property Takeover & Team Retraining

A takeover requires a fresh operating baseline: assess, clarify, rebuild SOPs, train, retrain, then monitor adoption and performance through the 90-day window. I assess the team and facility, clarify expectations, build or reinforce SOPs, train managers on high-performance leadership, retrain office teams on operating standards, and monitor adoption and business performance through the improvement window.

90-DAY TRANSFORMATION LOGIC



ACCOUNTABILITY	MEASUREMENT
A named owner is accountable at each stage of the 90-day window.	Baseline vs. current performance across the window.
Manager and team assessments happen before any training is prescribed.	Process and revenue gap closure rate.
Weekly governance holds the plan to evidence, not assumption.	Stabilization measured against the entry baseline.

SECTION 02 · MANAGER DEVELOPMENT

The Manager Is the Sustainability Mechanism

The intervention holds only when the onsite manager can lead, train, govern, and develop the team independently. This is the capability standard I develop in every manager.

CAPABILITY	STANDARD I DEVELOP
Lead & train the office team	How to lead and train the office team consistently.
Assign, track & govern work	How to assign, track, and govern work rather than relying on informal follow-up.
Coach individual performance	How to coach individual performance and address weak adoption.
Read operational data	How to connect occupancy, leads, renewals, and service execution to revenue.
Manage escalation & coordination	How to manage escalation, cross-functional coordination, and customer experience.
ACCOUNTABILITY	MEASUREMENT
The manager owns team training, work governance, and coaching.	Manager capability assessment score.
Weak adoption is a signal for the manager to intervene, not ignore.	Team performance under the manager vs. baseline; reduction in informal follow-up and missed handoffs.

SECTION 03 · OFFICE-TEAM DEVELOPMENT

The Retraining Curriculum

The office team is retrained across the full relationship and account-management standard, from first lead to renewal, on the standards that drive occupancy, retention, customer experience, and revenue.

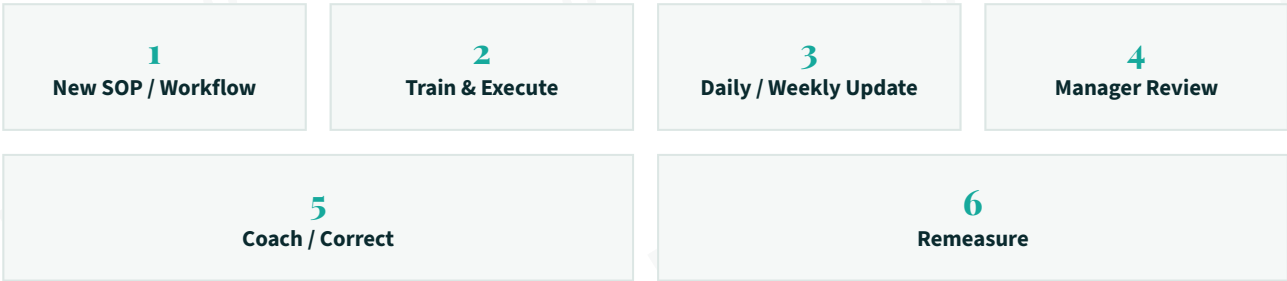
CAPABILITY AREA	WHAT IT COVERS
Relationship & account management	Proactive ownership of the resident and account relationship.
Lead & customer follow-up	Disciplined, timely follow-up across every lead and account.
Call-return & communication discipline	Return calls, acknowledge requests, confirm resolution.
Lead tracking & closing	Track every lead through defined stages to a close.
Data & occupancy awareness	Understand how daily execution affects occupancy and revenue.
Progress reporting	Completed, open, blocked, at-risk, next action, owner, due date.
Renewal strategy & advance follow-up	Begin proactive renewal engagement well ahead of expiration.
Escalation & resolution	Escalate appropriately while keeping ownership and visibility.
Move-in / transfer coordination	Coordinate readiness and protect the onboarding experience.
SOP & tool adoption	Consistent, accurate use of the operating tools and SOPs.

SECTION 04 • GOVERNANCE & ACCOUNTABILITY

Make Adoption Visible

A central reporting cadence makes adoption visible, so management can see who is following the new operating model and where coaching or intervention is required. Daily and weekly updates create shared accountability: who is following the model, where execution is slipping, and where coaching is needed.

ADOPTION GOVERNANCE LOOP



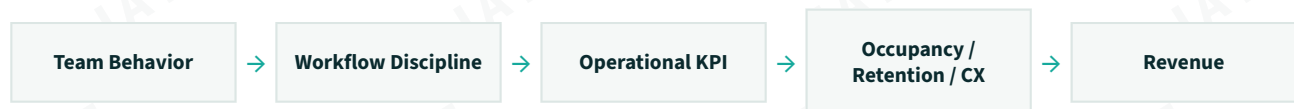
ACCOUNTABILITY	MEASUREMENT
Every SOP and workflow has an owner and a reporting cadence.	SOP adoption rate via the daily/weekly reporting trail.
Adoption gaps trigger coaching or correction, not silent drift.	Execution-slippage points identified in manager review; post-correction remeasurement vs. the prior read.

THE CAPABILITY ON DISPLAY

What This Playbook Proves

- I can enter an underperforming operating environment and establish a measurable baseline.
- I can distinguish manager-development gaps from frontline skill and process gaps.
- I can create training and SOP infrastructure around the actual business problem.
- I can govern adoption after training instead of assuming implementation succeeded.
- I can connect team behavior and workflow discipline to occupancy, retention, customer experience, and revenue.

BEHAVIOR-TO-REVENUE CONNECTION



RESUME-ANCHORED PROVING GROUND

Proven as **Regional Client Success & Operations Manager** across a 150+ account SaaS-enabled Yardi portfolio, four multifamily communities, 600–1,000 active accounts, and cross-functional teams up to 50 per location, with reported aggregate outcomes of **40% ROI/MRR improvement, 60% renewal-retention improvement, and churn reduction from a 10% baseline.**

This is a portable strategic executive playbook. The proving ground above is one regional portfolio environment; the method applies to any proptech, regional real-estate, or large multi-site team operation that needs baseline, retraining, SOP infrastructure, and governed adoption.