



AI for real estate and property management

Applying AI to leasing, maintenance, documents, tenant service and portfolio insight with human accountability.

WORKS WITH THE ASSISTANTS TEAMS ALREADY USE



EDITION 45 / EMBER & ICE

EXECUTIVE WORKING EDITION - 08 OCT 2026

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AT A GLANCE

Applying AI to leasing, maintenance, documents, tenant service and portfolio insight with human accountability.

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Property businesses run on leases, listings, work orders, inspections and a steady flow of questions from residents, tenants, owners and vendors. AI can read and abstract leases, triage maintenance requests, draft listings and replies, and assemble portfolio reports in a fraction of the time. The same work touches people's homes, their personal information and decisions that fair housing and anti-discrimination rules govern, so the controls matter as much as the capability. This playbook covers where AI fits across lease abstraction, maintenance triage, tenant service, listings and portfolio reporting, how to protect tenant data and fair treatment, how to measure results honestly and how to roll out in stages.

WHO IT IS FOR

Property managers, asset managers, leasing and operations leaders, brokerage principals and the technology and compliance owners at owners, managers, brokerages and commercial and residential portfolios.

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TIME TO USE

70 minutes to read; two workshops to apply

What you will have at the end

- A shortlist of property workflows ranked by value, risk and readiness
- A rule set for what AI may and may not do in leasing, screening and tenant communication
- A tenant data and privacy control checklist
- A baseline and metric set covering time, quality, resident experience and cost
- A 90-day plan from one property or portfolio slice to a decision to scale

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EXECUTIVE BRIEF

What AI changes in real estate and property management

01



AI shortens the distance between a document or request and a good human decision, but the decisions about people, homes and money stay accountable to named staff.

A property operation generates documents and requests at a steady rate. A commercial portfolio holds hundreds of leases with different clauses on rent escalation, renewal options, operating expense recoveries and termination rights. A residential manager receives maintenance requests by text, email, portal and phone, many written in a hurry and some describing urgent safety issues in a single vague sentence. Leasing teams answer the same questions about availability, fees and policies again and again. Owners want reports that pull numbers from several systems and explain what changed. 

These tasks have a common shape: reading unstructured text, finding the relevant facts, and writing a response or summary. That is what language models do reasonably well. Lease abstraction that takes an analyst two hours per document can be prepared in minutes, then checked by the analyst. Maintenance triage can group requests, detect likely emergencies and prepare vendor dispatch details. Listing descriptions and tenant replies can be drafted in the right tone. 

The cautions are just as clear. Housing is subject to fair housing and anti-discrimination rules in many jurisdictions, and an automated process that treats applicants or residents differently, or that steers people, can create legal and ethical exposure even when no one intended it. Tenant data includes identity, income, payment history, household members and sometimes health-related accommodation requests. A summary of a lease that misstates a notice period can cost real money. This playbook keeps AI in a supporting role and puts people in charge of leasing decisions, notices, deposits, evictions and anything affecting a household's housing.

- Start with documents and internal summaries, where errors are caught by staff before they reach a resident 
- Use AI to speed maintenance intake and routing, with a human rule for emergencies and habitability

- Do not use AI to make or recommend applicant selection, pricing for individuals or enforcement actions without accountable review and legal input
- Protect tenant data as a core design requirement
- Check current fair housing, tenant screening and privacy requirements for each jurisdiction; this playbook is not legal advice

PLAIN TEST

Would you be comfortable explaining the process to a resident, an owner and a regulator, step by step, including what the AI did and who decided? If not, the design is not ready.

WORKING QUESTION

Which recurring document or message type costs your team the most reading time per week, and what could go wrong if a summary of it were wrong?

WHERE IT FITS

Where AI fits in property work, and where it does not

02

AI fits where staff read and write most, and fits poorly where a decision affects a person's access to housing.

Sort property workflows by what happens if the output is wrong and who sees it. Internal outputs checked by a professional, such as an abstract of a lease, carry modest risk. Resident-facing outputs, such as an answer about a late fee, carry more. Outputs that influence who gets housing, on what terms or whether a household is pursued for arrears carry the most, and should stay with trained people operating under legal guidance.

USE CASE	FIT	REASON AND CONDITION
Lease abstraction	Strong with review	Heavy reading; abstract shows clause text and page reference; analyst verifies
Maintenance request triage and routing	Strong with safety rules	Fast grouping and dispatch; emergencies handled by explicit rules and humans
Tenant service replies	Strong with grounding	Answers drawn from approved policies, with hand-off for disputes
Listing descriptions and marketing copy	Moderate	Draft quickly; review for accuracy and fair housing compliant language
Portfolio and owner reporting	Strong	Assemble numbers and commentary; analyst checks figures against source
Inspection notes and photo summaries	Moderate	Organizes evidence; condition judgments stay with inspectors
Applicant screening or ranking	Not recommended without legal review	High discrimination risk; decisions need accountable human process
Individual rent setting or lease renewal offers	Cautious	Pricing tools need governance; avoid inputs that proxy for protected traits
Evictions, notices and arrears enforcement	Preparation only	Legal deadlines and procedure require qualified review

Residential and commercial differ

Commercial portfolios benefit most from lease abstraction, critical-date tracking and recovery reconciliation, because their documents are long and bespoke. Residential portfolios gain more from maintenance intake, resident communication and turn management, because volume is high and documents are standardized. Brokerages see value in listing preparation, inquiry follow-up and transaction coordination. Choose the use that matches your own pain.

COMMON MISTAKE

Starting with applicant scoring because it sounds efficient. It is the use with the highest legal and reputational exposure and the weakest case for a first project.

WORKING QUESTION

Of your candidate uses, which touch decisions about who lives where, and what is your plan to keep humans and legal review in charge of them?

HOW IT WORKS

How it works, in plain language

03

The assistant reads the documents or messages, pulls out the facts, compares them with your rules, and prepares something for a person to confirm.

Lease abstraction illustrates the pattern. The system converts the lease and its amendments to text, then looks for defined items: parties, premises, term, rent and escalations, options, operating expense terms, insurance, assignment, default, notice requirements and key dates. For each item, it returns the extracted value and the exact clause text with a page reference. The abstractor reviews, corrects and approves. Amendments are the usual trap, because a later document may override an earlier clause, so the system must be given the complete document set and show which document each value came from.

01 Gather

Collect the full lease file, including amendments and side letters, or the maintenance request with unit, history and photos.

02 Extract or classify

Pull defined fields, or classify the request by type, urgency and trade, with reasons.

03 Check against rules

Compare with your abstract template, vendor rules, service levels and safety criteria.

04 Prepare the output

Produce the abstract, work order, reply or report with sources shown.

05 Confirm and record

A person approves, edits or rejects, and the corrections are saved for testing.

Maintenance triage

Maintenance messages mix routine items with potential emergencies. A resident may write that the kitchen is a bit damp and mention a smell of gas in the same message. Model-based triage can help by reading the full text, but emergency categories should also be protected by simple rules: certain words and categories always trigger an immediate human or on-call escalation, and the system never delays a message while it processes. Use AI to improve routing and speed, never as the only safeguard for life-safety issues.

MODE	WHAT AI DOES	WHO DECIDES
Assist	Summarizes, drafts, abstracts	Staff member using professional judgment
Recommend	Suggests urgency, trade or next step with reasons	Staff, who can override and record why
Act within rules	Creates standard work orders, sends acknowledgments	Pre-approved rules; no adverse or legal effect

WORKING QUESTION

Which clearly stated rules would you hard-code so that emergency maintenance requests never wait on a model?

OPERATING MODEL

Operating model, roles and decision rights

04

Assign every property workflow an owner, a reviewer and a list of things the system may not do.

Property companies often run lean teams across many sites, with a mix of in-house staff, third-party managers, vendors and owners. That structure makes accountability easy to blur. A resident message answered by a bot may reach an owner's decision, a vendor's workload and a manager's compliance duty at once. Set the operating model before deployment, and write it down in a one-page decision-rights sheet that site teams can follow.

ROLE	RESPONSIBILITY	TYPICAL OWNER
Workflow owner	Scope, service levels, outcomes	Operations director, property manager
Reviewing professional	Verifies abstracts, reports and sensitive replies	Lease administrator, asset analyst, site manager
Compliance lead	Fair housing, screening, privacy, notices	Compliance officer or outside counsel
Maintenance coordinator	Confirms urgency, dispatches vendors, closes loops	Maintenance supervisor
Data owner	Keeps unit, lease, vendor and policy data current	Property accounting, systems lead
AI product owner	Templates, test sets, monitoring, change control	Operations excellence or IT
Owner or client liaison	Agrees what is automated on the owner's behalf	Asset manager

Decision rights to write down

- The system never decides applicant eligibility, lease renewal terms for an individual, security deposit deductions, fee waivers or enforcement steps

- Any message to a resident about money owed, lease violations, entry to a unit or accommodation requests is reviewed or drawn from an approved template
- Requests for reasonable accommodations or modifications are routed to trained staff and are not answered by automation beyond acknowledgment
- Emergency routing rules are owned by the maintenance supervisor and tested quarterly
- Staff can override any automated classification and must record the reason



Third-party management raises a further question: whose policy applies? If a management company uses AI on an owner's portfolio, the management agreement, the owner's data rights and the resident's privacy notice should be consistent about what is done and with whom data is shared. Raise this with legal counsel before deployment rather than after an owner asks.

TRAINING

Teach staff the typical failure modes: invented clauses, mixed-up amendments, confident answers about local rules, and tone that sounds cold in a sensitive message. Use real examples from your own files.



WORKING QUESTION

Where does your current process leave it unclear who is accountable for a resident message, and how would you fix that before adding AI?



RISKS AND CONTROLS

Risks, controls and human review

05

The central controls are fair treatment, tenant data protection, accurate documents and safe handling of urgent requests.

Fair housing and anti-discrimination laws exist in many countries and states, and they typically prohibit treating people differently in housing on certain protected grounds, which vary by place. They can apply to advertising, screening, terms and conditions, services and enforcement. Guidance from regulators has stressed that automated tools do not remove responsibility. Requirements differ by jurisdiction and change, so check current requirements with qualified counsel. A practical stance is to avoid using AI where it could steer, filter or rank people, to review marketing language, and to apply consistent policies across residents.

RISK	WHAT IT LOOKS LIKE	CONTROL
Discriminatory effect	Replies, listings or screening treat groups differently or steer people	Avoid ranking applicants; review marketing text; consistent templates; periodic audit of outcomes
Tenant data exposure	Identity, income or health details sent to unapproved tools	Approved tools only, data minimization, role-based access, vendor terms, retention limits
Wrong lease facts	Abstract misses amendment or misstates notice period	Show clause text and source; second review for critical dates; test on amended leases
Missed emergency	Urgent request classified as routine	Hard-coded escalation rules; on-call alerting; audit of urgent cases
Misleading communication	Draft promises repairs or rent terms not authorized	Approved templates; block commitments; review of sensitive categories
Owner conflict	Automation done on owner data without agreement	Contract clarity, owner approval, reporting on what is automated
Record gaps	Cannot show what was sent or decided	Log inputs, outputs, edits and approvals

Tenant data controls

- Inventory which tenant data each tool can see, and remove what it does not need
- Approved tools only; no personal accounts on public AI services
- Mask identifiers, such as government IDs and bank details, before processing where possible
- Retention and deletion rules documented and applied to AI logs
- Vendor contract states that data is not used to train models for others without consent
- Access limited by role and site
- Resident privacy notice reviewed for consistency with actual use
- Incident response plan covers AI tools



REASONABLE ACCOMMODATION

Requests relating to disability, assistance animals or modifications involve sensitive information and legal duties. Route to trained staff immediately. Automation may acknowledge receipt, but should not assess, deny or advise.



WORKING QUESTION

If a resident asked what personal information your AI tools process and where it goes, could you answer accurately today?



MEASURING VALUE

Measuring quality and value

06

Judge results on speed, accuracy and resident or owner outcomes, against a baseline from before the pilot.

Property metrics are familiar: work order cycle time, first-time fix rate, occupancy, days to lease, renewal rate, delinquency and resident satisfaction. Add AI-specific measures, but keep the business outcome in view. A tool that answers messages instantly but raises repeat contacts or complaints has not improved service. Take a baseline over at least a month for the sites in scope, and note seasonality: maintenance and leasing demand differ across the year.

METRIC	DEFINITION	WHY IT MATTERS
Abstraction time and accuracy	Minutes per lease and correct fields over audited fields	Time saved without hidden errors
Critical date accuracy	Share of dates matching verified source	Missed dates are costly
Work order response time	Request received to first action	Resident experience and safety
Urgent request catch rate	Share of true emergencies escalated within target	Safety control
First-contact resolution	Inquiries resolved without a repeat contact	Shows reply quality
Draft edit rate	Share of drafts changed by staff, Template and grounding quality with reasons	
Complaints and escalations	Count per thousand contacts	Guards against harm
Report preparation time	Hours to produce owner reports, with variance checks	Analyst capacity

Illustrative baseline

The numbers here are illustrative only. Suppose a commercial manager abstracts 120 leases during a portfolio onboarding, at an average of 2.5 hours each, or 300 hours. If assisted abstraction brought the average to 1 hour including review, with field accuracy at or above the baseline from the audited sample, the saving would be about 180 hours. If review found that critical dates were wrong in one lease in ten, the process needs redesign before it is trusted, however fast it is.

- Audit a random sample of every output type each week during the pilot
- Test urgent-request detection with a seeded set of real, anonymized emergency messages
- Compare resident satisfaction before and after for the sites in scope
- Count hours freed only when they are redeployed to a stated use
- Include review time, licenses, integration and training in costs

WORKING QUESTION

What is the smallest error rate on critical dates and urgent requests that you would accept, and who signs off on that threshold?

IMPLEMENTATION

Implementation guide

07

Begin with one portfolio slice and one workflow, test on your own messy files, and expand only with evidence.

01 Choose the slice

Pick one workflow such as lease abstraction for a defined set of properties or maintenance triage for two residential sites. Name the owner and the reviewing professional.

02 Prepare documents and rules

Collect clean copies of leases with amendments, policies, vendor lists and service levels. Write the abstract template and emergency rules in plain language.

03 Build the test set

Assemble 50 to 100 leases or 300 to 500 past maintenance requests with known correct outcomes, including awkward ones such as scanned amendments and vague messages.

04 Pilot in shadow

Run the tool alongside staff for a few weeks and study each difference, especially urgent misses and date errors.

05 Go live with review

Release to a small team with mandatory review, logging and a simple way to flag errors.

06 Expand deliberately

Add sites or document types one at a time, repeating test and review at each step.

Systems and data

Property data usually lives in a property management system, an accounting platform, a work order tool, a document store and email. Begin with read access and side-by-side review. Where the tool writes back, for instance to populate a lease abstract or create a work order, make the write a deliberate step by the reviewer. Keep unit and lease identifiers consistent across systems, because mismatched identifiers cause wrong-unit replies and wrong-lease abstracts, the kind of error residents notice immediately.

Readiness checklist

- Named workflow owner, reviewer and compliance lead
- Decision-rights sheet approved and shared with site teams
- Emergency routing rules written and tested
- Test set built and scored for each output type
- Tenant data inventory and vendor terms reviewed
- Resident-facing templates approved by compliance
- Manual fallback tested
- Weekly review scheduled for 90 days

BE HONEST WITH RESIDENTS

If residents interact with an automated assistant, say so, offer a clear route to a person, and honor it. Check current disclosure requirements for your jurisdiction.

WORKING QUESTION

Which 50 leases or 300 maintenance messages would make a convincing test, and who can mark the correct answers?



PITFALLS

Pitfalls and a hypothetical scenario

08



Most failures come from untested edge cases, poorly governed data and communications that overreach.

- Abstracting from a base lease while ignoring amendments
- Allowing an assistant to quote local rules or legal deadlines from general knowledge
- Using one tone for every message, including sensitive arrears or accommodation matters
- Treating maintenance classification accuracy as proven after testing only on tidy messages
- Feeding sensitive tenant files to a tool without checking data terms
- Using marketing copy generated without review, with phrases that may steer or exclude
- Reporting hours saved without checking date accuracy, complaints or repeat contacts



HYPOTHETICAL SCENARIO (ILLUSTRATIVE, NOT A REAL CASE)

A manager introduces AI maintenance triage across a residential portfolio. In the first month, the test set shows good results. In week five, a message reads: 'The ceiling in the bathroom is bowing and drips when someone runs the shower upstairs.' It is classed as a routine plumbing issue. A weekly urgent-case audit catches it, and the team adds structural water damage to the hard-coded escalation rules and extends the test set.



The audit worked because the team had decided in advance to review every urgent-adjacent case, not just the ones the tool flagged. They also did not treat the first month of good results as proof. Edge cases are, by definition, rare in a test set, and the rare cases are often the

expensive ones. Build a habit of adding every miss to the test set so the system and the rules improve together.



WARNING SIGN	LIKELY CAUSE	FIRST RESPONSE
Residents repeat questions	Replies are accurate but not helpful	Review replies, simplify, offer a person
Abstracts differ across reviewers	Template is ambiguous	Clarify field definitions with examples
Complaints about tone	Generic templates on sensitive topics	Route sensitive categories to people
Edit rate falling to zero	Reviewers rubber-stamping	Seed errors and sample more deeply



WORKING QUESTION

What is your process for turning each missed case into a permanent test and, where relevant, a new rule?



BUYING QUESTIONS

Questions to ask before you buy or build

09

Ask for proof on your documents, plain answers on data and fair treatment, and clear terms on change and exit.

Questions for any supplier

- Will you run our own leases, including scanned and amended ones, and share field-level results and failure examples?
- Does every extracted value show clause text and page so a reviewer can verify in seconds?
- How do you handle urgent maintenance messages, and which rules can we configure ourselves?



- Which features score, rank or filter people, and what testing and documentation exist on fair housing and discrimination risk?
- Where is tenant data stored, who can access it, how long is it kept and is it used to train models for others?
- How do you notify us of model changes, and can we pin versions and re-test?
- What logs and exports can we get for disputes, owners and regulators?
- How does the product integrate with our property management and accounting systems?
- What is the total cost, including integration, review effort, training and support?



OPTION	FITS WHEN	WATCH FOR
Feature inside your property management platform	You want fast adoption and low integration	Limits on customization, data terms, roadmap dependence
Specialist lease abstraction tool	Commercial portfolio with heavy documents	Template fit, review workflow, exit and export
General AI platform you can configure	Varied tasks and internal skills	You own testing, security and ongoing upkeep
Custom build	Distinctive process and engineering depth	Maintenance burden and compliance upkeep



Whichever route you take, keep the control points in your hands: decision rights, templates, test sets, emergency rules, logs and the ability to switch off. Those assets survive supplier changes, and they are what owners, residents and regulators will ask about. Halden & Company helps property businesses choose the first workflow, build the test set and design the data and fair treatment controls. Free assessments are available at halden.company/assessments, and you can reach the team at halden.company/contact.



WORKING QUESTION

If an owner asked you tomorrow to list every way AI touches their residents' data, how long would it take you to answer with confidence?



30 / 60 / 90

A first quarter that produces evidence

10

Prove one workflow on a small slice of the portfolio, add controls while it runs, then decide on scale from evidence.

First 30 days: ground it

- Choose one workflow and one portfolio slice, and name the owner, reviewer and compliance lead
- Write the decision-rights sheet, including what AI may never decide
- Take a baseline for time, accuracy, response time and complaints
- Build a test set from real leases or maintenance requests, with correct answers
- Complete the tenant data inventory and vendor terms review

Days 31 to 60: test it

- Run shadow mode and examine every date error and every urgent miss
- Hard-code and test emergency escalation rules
- Approve templates for resident communication with compliance
- Train reviewers with seeded errors and real examples
- Release to a small team with full logging and weekly sampling

Days 61 to 90: decide

- Compare results with baseline, including resident satisfaction and complaints
- Decide to scale, change or stop, and record the reasons
- Share a plain-language note with residents or owners on what is automated and how to reach a person
- Add the next site or document type using the same test and review pattern
- Schedule quarterly review of templates, rules, data access and vendor changes

GLOSSARY

Terms used in this publication

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TERM	MEANING
Lease abstraction	Extracting the key terms and dates from a lease into a structured summary.
Critical date	A lease date with financial or legal consequence, such as a renewal option deadline or notice window.
Fair housing	Laws and principles that prohibit discrimination in housing on certain protected grounds, which vary by jurisdiction.
Reasonable accommodation	A change to rules or practices that lets a person with a disability use and enjoy housing, handled by trained staff.
Work order	A record of a maintenance task, with location, description, assignee and status.
Triage	Sorting requests by urgency and type so the right people act first.
Operating expense recovery	Charges passed from a landlord to commercial tenants for shared property costs.
Data minimization	Collecting and exposing only the personal data a task needs.
Shadow mode	Running AI beside normal work without affecting outcomes, so results can be compared.
First-contact resolution	The share of inquiries resolved without the resident needing to ask again.
Amendment	A later document that changes terms of an existing lease and may override earlier clauses.
Proxy variable	An input that stands in for a protected characteristic and can cause uneven outcomes.

A note on use

This playbook is general guidance, not legal advice. Fair housing, tenant screening, landlord-tenant and privacy requirements vary by jurisdiction and change over time. Check current requirements with qualified counsel.



TAKE THE NEXT STEP

Take the free Halden assessment at halden.company/assessments, or talk to us at halden.company/contact about turning this into a plan for your organization.

