

IMPLEMENTATION

The 90-day portfolio intelligence playbook

An original implementation report for a focused pilot: connect the records, surface opportunities, and verify the first outcomes.

A practical framework for real estate asset managers. Read the evidence, agree the next step, and keep the outcome traceable.

Open access | 10 minute read | realestate.managent.com

Executive brief

A useful real estate intelligence pilot begins with a decision that management already needs to make. The goal of the first 90 days is a repeatable process that connects reliable records to reviewed actions and evidenced outcomes. Dashboard coverage is a supporting measure; trust in the decision is the primary one.

This report proposes a five-to-ten-asset pilot. Its timetable is a planning framework, not a guaranteed delivery date. Source access, document quality and client approval capacity will determine how much work is feasible. All examples are synthetic; this is an original Managent operating playbook rather than a survey of industry performance.

- Select a varied pilot portfolio and one executive sponsor.
- Name the data, lease, finance and action owners.
- Choose two or three recurring decisions to improve.

Days 1-30: connect and reconcile

Inventory the rent rolls, signed leases, amendments, actual accounts, budgets, valuations, debt schedules and capex records already used by the team. Obtain permission for each source. Map stable asset IDs before merging records from property managers or different systems.

Define financial periods and units in a shared dictionary. Distinguish monthly rent from annual rent, revenue from collections, and budget from revised forecast. Reconcile imported totals at asset level. Publish an exception log with a named owner for each missing or inconsistent field.

End this phase with a reviewed baseline for the selected assets. A record is ready when its meaning, source and reviewer are visible. Automation should retain those attributes; it should not turn an unresolved discrepancy into a confident answer.

- Deliverable: canonical asset and lease register.
- Deliverable: source mapping and reconciliation log.
- Gate: finance and asset owners approve the baseline.

Days 31-60: identify and test

Start with opportunities that can be explained directly from the source records: rent reversion, indexation review, guarantee gaps, supplier cost anomalies, capex overruns and financing deadlines. Each finding needs a source date, calculation, confidence description and recommended next decision.

Use comparable service scopes for supplier comparisons. For rent scenarios, retain the market source and separate gross annual reversion from incentives, fees, vacancy and capex. Explain overlaps between initiatives before summing their value.

Ask an asset manager to test each high-priority finding against the original evidence. Record false positives and corrected assumptions. This review turns a detector into an operating process and reveals where the source model needs improvement.

- Deliverable: reviewed opportunity register.
- Deliverable: documented calculations and assumptions.
- Gate: management selects a small set of actions.

Days 61-90: approve, execute and measure

For each approved action, retain the baseline and assign an owner, deadline and approval boundary. Draft the lease brief, supplier comparison or financing review needed to move it forward. External communication and financial commitments remain subject to the company's authority policy.

Review open actions weekly. Record progress, blockers and any assumption changes. When an outcome is supported by an executed document or observed record, capture the effective date and distinguish annual run rate from the cash movement in the period.

The end-of-pilot review should identify which workflows are repeatable and which still require bespoke work. Expand the portfolio only when the model, review process and accountability survive normal monthly updates.

- Deliverable: approval and execution audit trail.
- Deliverable: baseline-to-outcome comparison.
- Gate: sponsor decides which workflows to extend.

A scorecard for the sponsor

Track the proportion of source records reconciled, the number of findings reviewed, the time to produce a report, and the number of actions with an accountable owner. Show identified, approved, in-execution and recorded captured value separately. Do not describe these measures as causal proof of financial improvement.

For every claimed outcome, ask what changed, how it was verified, when it took effect and which costs were excluded. Use a monthly archive so the team can inspect what was known at each decision date. This is the evidence needed to decide whether to extend the pilot.

- Data: reconciled records and unresolved exceptions.
- Intelligence: reviewed findings and rejected false positives.
- Execution: ownership, deadlines and approval evidence.
- Outcomes: effective dates, supporting records and net effects.

Worked example

Illustrative pilot opportunity

A 3,400 m² lease with a EUR 5/m²/month gap to a supplied market assumption produces EUR 204,000 gross annual rent potential. The pilot has not captured that amount. A reviewed renewal scenario must still address concessions, costs, timing and the signed outcome.

Synthetic example; no guaranteed savings

Your review checklist

- ☐ An executive sponsor owns the pilot decision.
- ☐ Source access and mappings are agreed.
- ☐ Baseline figures are reconciled.
- ☐ Finding calculations are reviewed.
- ☐ Actions have owners and approval boundaries.
- ☐ Outcomes are distinguished from estimates.

Sources and scope

This is original Managent guidance. Timetables and calculations are illustrative planning tools. They are not industry survey findings, market forecasts or measured client outcomes. Review assumptions and contractual requirements with the people responsible for the portfolio.

RICS: Responsible use of AI in surveying practice

Background on governance and professional oversight. The proposed pilot timetable is original Managent guidance.