STEELE PROCESS PARTNERS

PORTFOLIO CASE STUDY · ANONYMIZED

Manual follow-up was turning a fixable process into avoidable fines.

A national residential property management organization was managing thousands of HOA violation cases through a manual, deadline-sensitive process, and paying real money every time a deadline slipped.

- Deadlines tracked by memory, spreadsheets, and individual habits
- Work assigned to agents one record at a time by managers
- Every association had different rules, timelines, and proof requirements

THE CORE PROBLEM

It wasn't one broken step. It was a manual, agent-dependent process trying to manage a high-volume, deadline-heavy, cross-functional workflow at scale.

HOW THE FIX CHANGED THE OUTCOME

Manual, deadline-driven tracking → **Automated assignment, reminders, escalations** → **Risk visible before the deadline, not after** → **Fewer avoidable fines and penalties**

WHY THE WORK KEPT SLIPPING

Manual work was carrying too much of the process.

Violation notices arrived by mail, scanned documents, and email. Each one required someone to recognize the violation type, understand the association's rules, assign the work, monitor the deadline, request proof, coordinate other teams, and close the loop.

Every step depended on a person remembering to do it. Performance varied by agent. Risk often became visible only after it had already increased.

STANDARDIZING THIS WASN'T SIMPLE

- Different rules per association
- Resident- vs. owner-responsible varied
- Six+ teams needed visibility
- Real financial exposure

WHAT THE WORKFLOW DEPENDED ON

1. Someone opening, scanning, and routing mail before work could start
2. Managers manually reviewing lists and assigning records one by one
3. Agents tracking deadlines, proof, and closure by memory and habit
4. Risk becoming visible only after a deadline had already passed

WHAT CHANGED · PART 1

Salesforce became the workflow hub, not just the record system.

The team already had a custom Salesforce object for HOA violations. It just wasn't doing the job. The object was enhanced to close the specific gaps creating risk:

Assignment logic

Replaced one-by-one manual assignment with automated, balanced distribution, so fewer manager bottlenecks.

Reminders & escalation

Automated cadence and deadline alerts, so risk surfaced before a fine did, not after.

Next-step routing

Unresolved violations automatically routed instead of waiting on someone to notice.

WHAT CHANGED · PART 2

Two more changes, and what it meant day to day.

Service & payment tracking

Service work orders and ledger tracking replaced manual cross-team handoffs.

Leadership dashboards

Workload, aging, and financial exposure visible before they became a problem.

BEFORE

Managers scanned list views and assigned records one at a time. Risk was discovered by whoever happened to notice.

AFTER

Work distributes itself. Reminders and escalations surface risk automatically, before it becomes a fine.

ROLE, IMPACT, AND WHAT THIS DEMONSTRATES

Make the right next action easier to see and complete.

The team moved from reactive list-monitoring toward a proactive, visible operating model:

Intake & assignment

Faster intake, more consistent distribution, less manager effort routing work.

Follow-up & deadlines

Automated reminders reduced the risk of missed action.

Cross-functional handoffs

Service, accounting, and resident communication easier to track end to end.

Leadership decisions

Workload and financial exposure became visible earlier, not after the fact.

Reported impact: the VP of Finance Operations reported roughly a 20 percent operational efficiency improvement.

Public, anonymized portfolio case study. Company names, internal details, and data values have been generalized. My role: current-state discovery, requirements, workflow design support, and QA/UAT/training coordination.

Salesforce Service Cloud, custom objects, assignment and escalation automation, service work orders, reports and dashboards.