

Workflow audit roadmap

Prepared for Example Lettings, Manchester (a fictional agency)
Prepared by LetMoe, September 2026

SAMPLE DOCUMENT. This roadmap is an illustrative example published to show the format, depth and arithmetic of a LetMoe workflow audit. Example Lettings does not exist. Every volume, hour and price is invented for the purpose of demonstration and must not be read as typical or expected results for any agency.

Summary

Finding	Detail
Time drains identified	Five, ranked by hours per week, from the agency's own stated volumes
Hours per week today	21.0 hours across the five tasks (owner, negotiator and administrator combined)
Hours per week after automation	5.5 hours, all of it reading and approving drafts
Estimated saving	15.5 hours per week, approximately 800 hours a year
Guarantee check	Exceeds the five hours per week threshold. The audit fee is earned.
Recommended first build	Build A: enquiry handling plus viewing administration, three weeks, £1,800 fixed
Recommended second build	Build B: arrears chasing, compliance tracking, landlord updates, three weeks, £1,600 fixed
Ongoing	Care Plan at £250 a month, cancel with thirty days' notice

Contents: 1 Agency snapshot. 2 Method. 3 Findings at a glance. 4 to 8 One section per time drain. 9 Build order and pricing. 10 Software costs. 11 Implementation timeline. 12 Data handling. 13 Governance and approval design. 14 Guarantee and next steps. Appendix: volumes, assumptions and items noted for later.

1. Agency snapshot

Example Lettings is a fictional three person letting and management agency covering Manchester city centre and the southern suburbs. It has traded for eleven years, manages approximately 180 tenancies for 40 landlords, and completes around eight new lets and fifteen renewals a month.

Team and roles

Person	Role	Where their week goes
Owner	Runs the business, landlord relationships, sales	Landlord updates, approvals, escalations, new business
Lettings negotiator	Enquiries, viewings, applications, listings	Answering portal enquiries, booking and confirming viewings, writing listings
Property manager and administrator	Rent, maintenance, compliance, renewals	Chasing rent, coordinating repairs, the compliance spreadsheet, tenancy paperwork

Systems in use

System	Used for	Notes
Property management platform	Tenancies, rent ledger, landlord statements, compliance dates (partly)	Exports available as CSV; API access available on the current plan
Shared mailbox	All enquiries, tenant and landlord correspondence	Portal enquiries arrive as emails; one shared inbox for three people
Shared calendar	Viewings, inspections, engineer visits	Viewings entered by hand after phone or email confirmation
Portals	Rightmove, Zoopla, OnTheMarket	Enquiries forwarded by email; no direct integration in use
Spreadsheet	Gas, EICR and EPC expiry dates	Checked by hand on the first Monday of each month
WhatsApp	Some tenant messaging by the negotiator	Out of scope for this roadmap; noted for a later phase

Volumes stated by the agency

Activity	Volume	Source
Enquiries	About 60 a week: 42 by portal, 18 by email or phone	Negotiator's estimate, checked against a fortnight of the inbox
Viewings	About 25 a week in a typical month, 40 in peak weeks	Calendar count for August
Late rent	12 to 15 tenancies a month pass the due date	Administrator's estimate from the rent ledger
Compliance certificates	180 properties, roughly 540 certificates across gas, EICR and EPC	Spreadsheet
Landlord updates	40 landlords, updated monthly by email	Owner
Maintenance requests	About 30 a month	Administrator (noted, not in the five drains; see appendix)

2. How the audit was conducted

One 45 minute session at the agency's office with the owner and the administrator, with the negotiator joining for the enquiry and viewing sections. Fourteen anonymised example emails were supplied afterwards: six enquiry exchanges, three arrears chasers, two viewing confirmations, two landlord updates and one compliance reminder. No system access was requested or used. Time per task is the agency's own estimate, cross checked against the example emails and, for viewings, against the August calendar. Where a range was given, the lower figure is used throughout, so the savings shown are conservative.

3. Findings at a glance

Time drain	Hours now	Hours after	Saved	Priority	Build
Enquiry handling	9.0	2.5	6.5	1	A
Viewing administration	4.0	1.0	3.0	1	A
Arrears chasing	3.0	0.5	2.5	2	B
Compliance tracking	2.0	0.5	1.5	2	B
Landlord updates	3.0	1.0	2.0	3	B
Total	21.0	5.5	15.5		

Hours are per week. Priority reflects hours saved against build effort, and the fact that enquiry handling and viewing administration share the same inputs (the inbox and the calendar), so they are built together. A sixth candidate, maintenance request handling, was reviewed and is noted in the appendix as a later phase.

4. Enquiry handling

How it works today

- A portal or email enquiry arrives in the shared inbox. Roughly four in ten arrive outside office hours.
- The negotiator opens the listing in the platform to check availability, price and any restrictions.
- The shared calendar is checked for viewing availability.
- A reply is typed from scratch, or adapted from a previous reply found by searching the inbox.
- The enquiry is logged in the platform as an applicant record.
- Duplicates (the same applicant enquiring on two portals) are spotted only if remembered.

Time cost today

60 enquiries a week at an average of 9 minutes each (the negotiator's estimate; the example emails suggest 7 to 12) is 9.0 hours a week. Enquiries arriving overnight or at weekends wait until the next working morning, an average of 11 hours by the agency's own reckoning.

The automated workflow

- Trigger: a new email arrives in the shared inbox from a portal address or the general enquiries address.
- Step 1: the message is classified as a viewing request, a question, an application, or other. Other is left for a person, untouched.
- Step 2: the property is identified from the enquiry and its current details are pulled from the platform export: price, availability date, furnishing, pets, minimum term.
- Step 3: the next three available viewing slots are read from the shared calendar, within the negotiator's set viewing hours.
- Step 4: a reply is drafted in the agency's established voice, answering the applicant's questions from the listing details and offering the three slots.
- Step 5: the draft is placed in an Approve folder in the shared inbox, with the applicant's name and the property in the subject line.
- Step 6: the negotiator opens the draft, edits if needed, and sends with one click. The applicant record is created in the platform at the same time.
- Out-of-hours: an immediate acknowledgement is sent stating the agency will reply first thing; the full drafted reply waits for approval in the morning. Duplicate enquiries from the same applicant are merged into one draft.

What stays with the team

Approval of every reply. Any enquiry classified as a complaint, a legal question, or anything unusual is left entirely to the negotiator. Negotiation on price or terms is never drafted.

Tools involved

The shared mailbox and calendar as they are. The property platform's daily CSV export or its API. An automation platform on the agency's own subscription. An AI drafting service that receives the enquiry text and listing details and returns a draft.

Safeguards

- No full reply is ever sent without a human click. The only automatic message is the out of hours acknowledgement, and it contains no property or applicant details.
- Applicant data stays inside the agency's mailbox and platform; the drafting service is not permitted to retain it.
- A daily cap on drafts and an alert if volume doubles, to catch portal errors or spam.

Time cost after

Reading and approving a good draft takes 2 to 3 minutes. 60 a week at 2.5 minutes is 2.5 hours. Saving: 6.5 hours a week. The negotiator also regains a quieter morning, since overnight enquiries are already drafted.

Build effort

Medium. The calendar and mailbox connections are standard; the platform export needs one afternoon of setup. Two weeks of build, then one week running on live enquiries with every reply approved by the negotiator.

5. Viewing administration

How it works today

- A slot is agreed by phone or email.
- The negotiator creates the calendar entry by hand, often later in the day, sometimes from memory.
- A confirmation email is typed: address, time, parking, who to ask for.
- The day before, if there is time, a reminder is sent. In peak weeks reminders are skipped and no shows rise.
- After the viewing, feedback is requested only if the negotiator remembers; landlords ask for it anyway.
- Cancellations are handled by phone; the freed slot is rarely re-offered.

Time cost today

25 viewings a week at roughly 10 minutes across the cycle (entry, confirmation, reminder, feedback, and the occasional cancellation) is about 4.0 hours a week. In peak weeks of 40 viewings it is closer to 7.

The automated workflow

- Trigger: a calendar entry is created or updated with the word Viewing and a property reference.
- Step 1: a confirmation is drafted with the property address, time, access notes and the negotiator's mobile, pulled from the property record.
- Step 2: at 4pm the day before, a short reminder is drafted with a one tap reply to confirm or cancel.
- Step 3: two hours after the viewing, a feedback request is drafted, and the answer is filed against the property for the landlord.
- Step 4: if an applicant cancels, a drafted note offers the slot to the next applicant on the property's enquiry list.
- All four messages sit in the Approve folder. The reminder alone can be set to send automatically once the agency is comfortable; that is the agency's choice, not the default.

What stays with the team

Agreeing the slot in the first place. Approving each message. Handling changes and anything that needs judgement, such as a landlord's access conditions.

Tools involved

The shared calendar and mailbox, the automation platform, the AI drafting service, and the enquiry list built in section 4.

Safeguards

- Reminders and feedback requests contain the property address only if the viewing is confirmed; nothing is sent for tentative entries.
- Feedback replies are filed, not forwarded automatically, so the landlord hears them through the owner.

Time cost after

About 2.5 minutes per viewing to approve four short messages, and fewer once reminders are automated. 25 a week is about 1.0 hour. Saving: 3.0 hours a week, more in peak weeks.

Build effort

Low. Built in the same fortnight as enquiry handling because it uses the same connections.

6. Arrears chasing

How it works today

- The administrator notices a late payment when reviewing the ledger, typically once or twice a week.
- A first email is typed. If unanswered, a firmer one follows when the administrator next remembers, then a formal letter.
- Timing is inconsistent: the same tenant may be chased on day 2 one month and day 12 the next.
- There is no single view of where each case stands, so the owner asks and the administrator checks the inbox.

Time cost today

12 to 15 late payers a month, each needing two to three touches plus the ledger checks and the owner's questions, comes to about 3.0 hours a week by the administrator's estimate.

The automated workflow

- Trigger: the platform's rent report is exported each morning and compared with the previous day.
- Step 1: any tenancy past its due date with an outstanding balance enters the sequence. Tenancies that have ended, are in notice, or are flagged for a payment plan are excluded.
- Step 2: day 3, a courteous reminder is drafted. Day 7, a firmer note with the balance and the agency's payment details. Day 14, a formal letter referencing the tenancy agreement.
- Step 3: before every message the current balance and tenancy status are checked again. If payment has landed, the sequence stops and a thank you is drafted instead.
- Step 4: every Friday a one page summary is drafted for the administrator and owner: who is in the sequence, at what stage, and what was paid this week.

What stays with the team

Approval of every message. All conversations with the tenant. Payment plans, hardship cases, guarantor contact, and any formal notice, which remain the administrator's and the owner's decisions and, where appropriate, the solicitor's.

Tools involved

The platform's rent export, the shared mailbox, the automation platform and the AI drafting service. No bank details pass through the automation; the agency's standard payment instructions are inserted from a fixed template.

Safeguards

- A tenant is never chased for a period after the tenancy ends, because status is checked before each message.
- The formal letter at day 14 is drafted only; it is never sent without the owner's approval.
- Tone is fixed by the agency's own three example emails, so the sequence sounds like the agency, not a template.

Time cost after

Approving two or three drafts per case and reading a Friday summary comes to about 0.5 hours a week. Saving: 2.5 hours a week, and rent is chased on the same day every month rather than when someone remembers.

Build effort

Medium. The rent export is the main dependency; the platform provides it on the current plan.

7. Compliance tracking

How it works today

- Gas, EICR and EPC dates for 180 properties are held in a spreadsheet, partly duplicated in the platform.
- On the first Monday of the month the administrator reads down the spreadsheet for anything due within six weeks.
- For each, an email to the landlord and a booking request to the engineer are typed individually.
- Renewed certificates are filed and the spreadsheet updated by hand, sometimes late, which is how two properties were found to be overdue in the past year.

Time cost today

The monthly check, the individual emails, filing and chasing engineers come to about 2.0 hours a week averaged across the month.

The automated workflow

- Trigger: a daily read of certificate expiry dates from the platform export, with the spreadsheet retired once the platform is confirmed complete.
- Step 1: six weeks before expiry, a landlord notice is drafted explaining what is due and the agency's standard fee, and an engineer booking request is drafted for the agency's usual contractors.
- Step 2: at two weeks, if no booking is confirmed, an escalation is drafted for the administrator and a firmer landlord note.
- Step 3: on the first of each month, a due list for the coming ninety days is drafted for the owner.
- Step 4: when a new certificate is filed against the property, the next expiry is set automatically.

What stays with the team

Approving every notice and request. Confirming bookings with engineers and access with tenants. Decisions where a landlord refuses or delays, which the owner handles personally.

Tools involved

The property platform export, the shared mailbox, the automation platform and the AI drafting service.

Safeguards

- Nothing is sent to a landlord or engineer without approval.
- The due list is the safety net: even if a notice is missed, the owner sees everything due within ninety days at the start of each month.

Time cost after

Approving notices and confirming bookings for roughly fifteen certificates a month is about 0.5 hours a week. Saving: 1.5 hours a week, and the risk of an expired certificate is materially reduced.

Build effort

Low to medium. The one off job is confirming that the platform holds every certificate date; that is a half day of the administrator's time in week one of the build.

8. Landlord updates

How it works today

- On or around the first of the month the owner writes to each of the 40 landlords.
- Each update is written from memory and by looking things up in the platform: rent received, any maintenance, tenancy status, anything upcoming.
- Updates slip when the month is busy, which is when landlords most want them.

Time cost today

40 updates at 4 to 5 minutes each, plus the looking up, is about 3.0 hours a week averaged across the month by the owner's own estimate. It is the owner's least favourite task.

The automated workflow

- Trigger: the first working day of the month.
- Step 1: for each landlord, the rent received, maintenance carried out, tenancy status and upcoming compliance items are pulled from the platform export and the records built in sections 6 and 7.
- Step 2: an update is drafted in the owner's established structure and tone, taken from the two example updates supplied.
- Step 3: all 40 drafts are placed in the Approve folder in one batch. The owner reads each, adds anything personal, and sends.
- Step 4: where a landlord has asked for a different frequency, the schedule is set per landlord.

What stays with the team

Reading and approving every update, and adding the personal line that landlords value. Any conversation that follows.

Tools involved

The platform export, the shared mailbox, the automation platform and the AI drafting service.

Safeguards

- No figures are stated in a draft that are not read directly from the platform; nothing is estimated by the drafting service.
- Drafts are batched so the owner reviews them in one sitting, with nothing sent piecemeal.

Time cost after

Reading, personalising and sending 40 drafts takes the owner about 1.0 hour a week averaged. Saving: 2.0 hours a week, and the updates go out on the first of the month every month.

Build effort

Low. Depends on sections 6 and 7 being in place, which is why it sits in Build B.

9. Recommended build order and fixed prices

Stage	Workflows	Timeline	Fixed price	Payment
Build A	Enquiry handling (section 4) and viewing administration (section 5)	Three weeks from confirmation	£1,800	£900 to begin, £900 on handover
Build B	Arrears chasing (6), compliance tracking (7), landlord updates (8)	Three weeks, starting after Build A handover	£1,600	£800 to begin, £800 on handover
Care Plan	Monitoring, fixes, prompt tuning, one new automation per quarter	Ongoing	£250 a month	Monthly in advance, cancel with thirty days' notice

Prices are fixed and valid for sixty days from the date of this roadmap. Founding client terms apply: the £399 audit fee is credited against Build A, and the first three months of the Care Plan are provided at £200 a month.

10. Software costs

All subscriptions are held in the agency's name and billed to the agency directly. Figures are the published entry tiers at the time of writing, given so that the total cost of running the systems is known before any decision is made.

Item	Typical monthly cost	Notes
Automation platform, entry tier	£10 to £30	Runs the triggers and steps described in sections 4 to 8
AI drafting service, usage based	£5 to £15 at the stated volumes	Charged per draft; scales with enquiry volume
Property platform	No change	Already in use; export and API access included on the current plan
Mailbox and calendar	No change	Already in use

Estimated total running cost: £15 to £45 a month, against an estimated 15.5 hours a week of staff time returned.

11. Implementation timeline

Week	Activity	Agency time needed
1	Access agreed in writing. Automation platform and AI service accounts created in the agency's name. Mailbox, calendar and platform export connected. Administrator confirms certificate dates in the platform.	Owner: 1 hour. Administrator: half a day.
2	Enquiry handling built and tested against the fortnight of example enquiries. Voice and tone tuned with the negotiator using real replies.	Negotiator: 1 hour.
3	Viewing administration built. Both workflows run live for five working days with every message approved. Fixes applied daily. Training session for all three staff. Build A handover and documentation.	All staff: 1 hour training. Negotiator: approvals as part of normal work.
4	Build B begins: rent export connected, arrears sequence built, compliance tracking built.	Administrator: 1 hour.
5	Landlord updates built. Arrears and compliance run live with approvals. First monthly landlord batch prepared for the owner's review.	Owner: 1 hour to review the first batch.
6	Fixes, tuning, training for the administrator and owner. Build B handover and documentation. Two weeks of post-handover support begin.	All staff: 1 hour.

Total agency time across the six weeks: roughly one working day, spread across three people.

12. Data handling by workflow

Workflow	Data touched	Where it is processed	Retention	Access
Enquiry handling	Applicant name, contact details, enquiry text; listing details	Inside the agency's mailbox and platform; enquiry text sent to the drafting service for the draft only	Drafting service retains nothing; applicant records live in the platform as now	Negotiator and owner
Viewing administration	Applicant name and contact details; property address; slot	Mailbox and calendar	As now	Negotiator
Arrears chasing	Tenant name, tenancy status, outstanding balance; no bank details	Platform export and mailbox	As now; Friday summaries kept 12 months	Administrator and owner
Compliance tracking	Property address, certificate dates, landlord and engineer contact details; no tenant data	Platform export and mailbox	As now	Administrator
Landlord updates	Landlord name, property, rent received, maintenance, tenancy status	Platform export and mailbox	As now	Owner

All automations run in accounts owned by the agency. LetMoe's access for the build is limited to what each workflow needs and is removed on handover unless a Care Plan is in place. The agency's privacy notice to tenants and landlords should be reviewed to reference automated drafting with human approval; a suggested paragraph is provided at handover.

13. Governance and approval design

The approval queue

Every workflow places its drafts in a single Approve folder in the shared mailbox, with a consistent subject line format: workflow, name, property. Staff work through the folder as part of normal inbox handling. Approving is one click; editing is normal email editing; discarding is deleting the draft. Nothing leaves the folder without a person moving it.

Roles

- Negotiator: approves enquiry replies and viewing messages.
- Administrator: approves arrears messages, compliance notices and engineer requests.
- Owner: approves landlord updates and the day 14 formal arrears letter; receives the Friday arrears summary and the monthly compliance due list.

Audit trail

Every draft, approval, edit and send is logged by the automation platform with a timestamp and the approver's name. The log belongs to the agency and is exportable at any time.

Switching off

Each workflow has a single switch in the automation platform. Turning it off stops all drafts from that workflow immediately with no effect on the others. The agency is shown where the switches are during training.

Escalation rules

- Any message classified as a complaint, a legal matter, a safety issue or a dispute is never drafted; it is flagged for a person.
- Any tenant or landlord who replies asking not to receive automated messages is excluded from all sequences the same day.
- If a workflow errors twice in a day it pauses itself and notifies the administrator and LetMoe.

14. Guarantee and next steps

This roadmap identifies an estimated 15.5 hours per week of savings against the agency's stated volumes, which exceeds the five hours per week threshold of the audit guarantee. The document is the agency's to keep whatever it decides. It is written so that any competent implementer could build from it.

Should the agency wish to proceed:

- Confirm Build A in writing. Work begins within ten working days of confirmation and the first invoice (£900).
- Agree the access schedule in section 12 and sign the short data handling agreement.
- Nominate the negotiator as the approver for Build A and set the daily viewing hours the calendar should offer.
- Founding client terms: the £399 audit fee is credited against Build A, and the Care Plan's first three months are provided at £200 a month, in return for a short written case study once the systems are in use, subject to the agency's approval before publication.

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Appendix: volumes, assumptions and items noted for later

Volumes and time estimates as stated

Task	Volume	Minutes each (stated)	Hours per week
Enquiry reply	60 a week	9	9.0
Viewing cycle (entry, confirmation, reminder, feedback)	25 a week	10	4.0 (rounded from 4.2)
Arrears touches	12 to 15 cases a month, 2 to 3 touches each	About 8 per touch plus ledger checks	3.0
Compliance check and correspondence	About 15 certificates a month	Monthly check plus 6 per item	2.0
Landlord update	40 a month	4 to 5 plus looking up	3.0

Assumptions

- Approving a good draft takes 2 to 3 minutes for a reply and under a minute for a reminder. These figures are used for the after column and are deliberately cautious.
- The property platform's daily export is reliable and includes rent, tenancy status and certificate dates. This is confirmed in week one of Build A.
- Volumes are for a typical month. Peak months will show larger savings in enquiry and viewing handling.
- No change is assumed in the agency's tone, policies or fees. The drafts follow the agency's own example emails.

Noted for a later phase

- Maintenance request handling: about 30 requests a month arriving by email, phone and WhatsApp. Acknowledgement, contractor request and tenant status update drafting would follow the same pattern as sections 6 and 7 and is estimated at a further 1.5 hours a week. Deferred because it depends on bringing WhatsApp messages into the mailbox, which the agency may prefer not to do.
- Renewal offers: fifteen a month, currently handled well by the administrator; a drafting workflow would save under an hour a week and is a candidate for a Care Plan quarterly automation.
- Listing copy: eight new lets a month; a modest saving, offered as a Care Plan automation rather than a build item.