Meld Workflows

From Chaos to Clarity: How Smart Automation is Redefining Property Management

Company Stage:

Series A

Company Size:

80+

Contribution:

Lead designer

Scope:

Two months

Project Results:

Tasks eliminated

+6 million

Adoption rate

44%

Automated work orders

26%

Unique workflows created

+5000

Series B

Secured

Customer savings

Millions

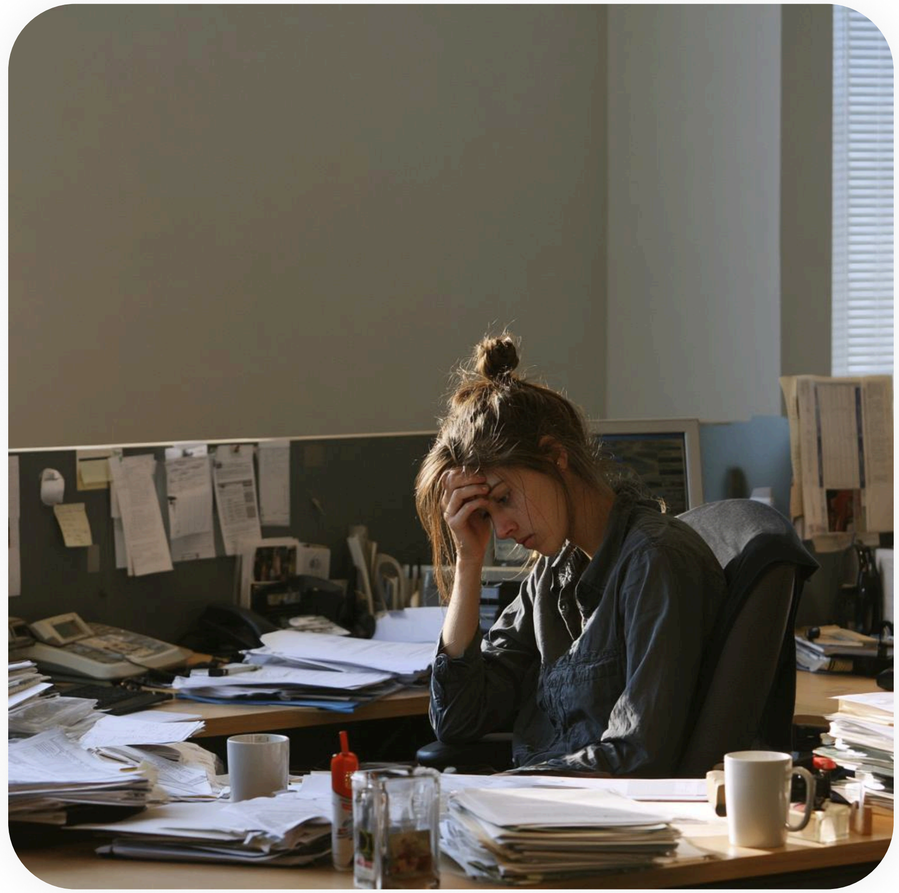
Sarah’s in the middle of a growing fallout from a small mistake.

She’s overwhelmed and needs a better way to do her work.

Overwhelmed by low-level tasks, she misses a critical HVAC request that ultimately leads to delays and bigger issues.

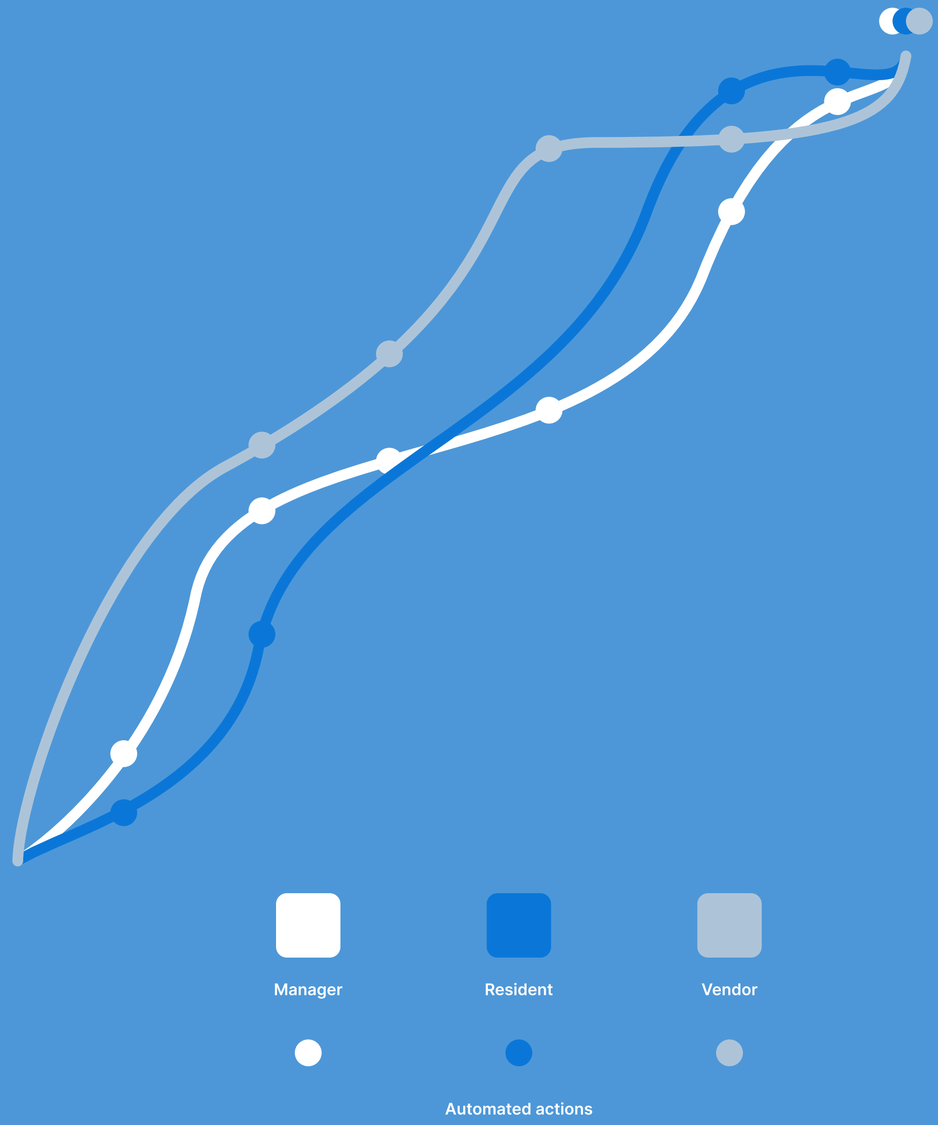
And now, the resident can’t move in—causing frustration, a possible bad review, and a potential lease loss for the company.

She realizes that solving this problem could **improve team performance, resident happiness, and ROI.**



Property management is a constant struggle of juggling priorities in chaotic environments

So we asked what if we could automate most of that chaos and allow our customers to focus more on improving team performance, increasing resident happiness, and boosting the company’s ROI.



Designing together with transparency.

With design being new to the company, siloing the process wasn’t the answer. Instead, I aimed to create an environment where diverse perspectives shaped better solutions.

Async Design Sharing

Proactively lending out insights and design ideas on the regular.

Customer Validation

Objective qualitative interviews and user testing

Collaboration

Getting buy-in from across design, product, and engineering.

Handoff

Constant contact with engineering to balance user needs with technical constraints.

Support Marketing

Joining calls to help the marketing effort to craft the best messaging angles.

Co-founder meetings

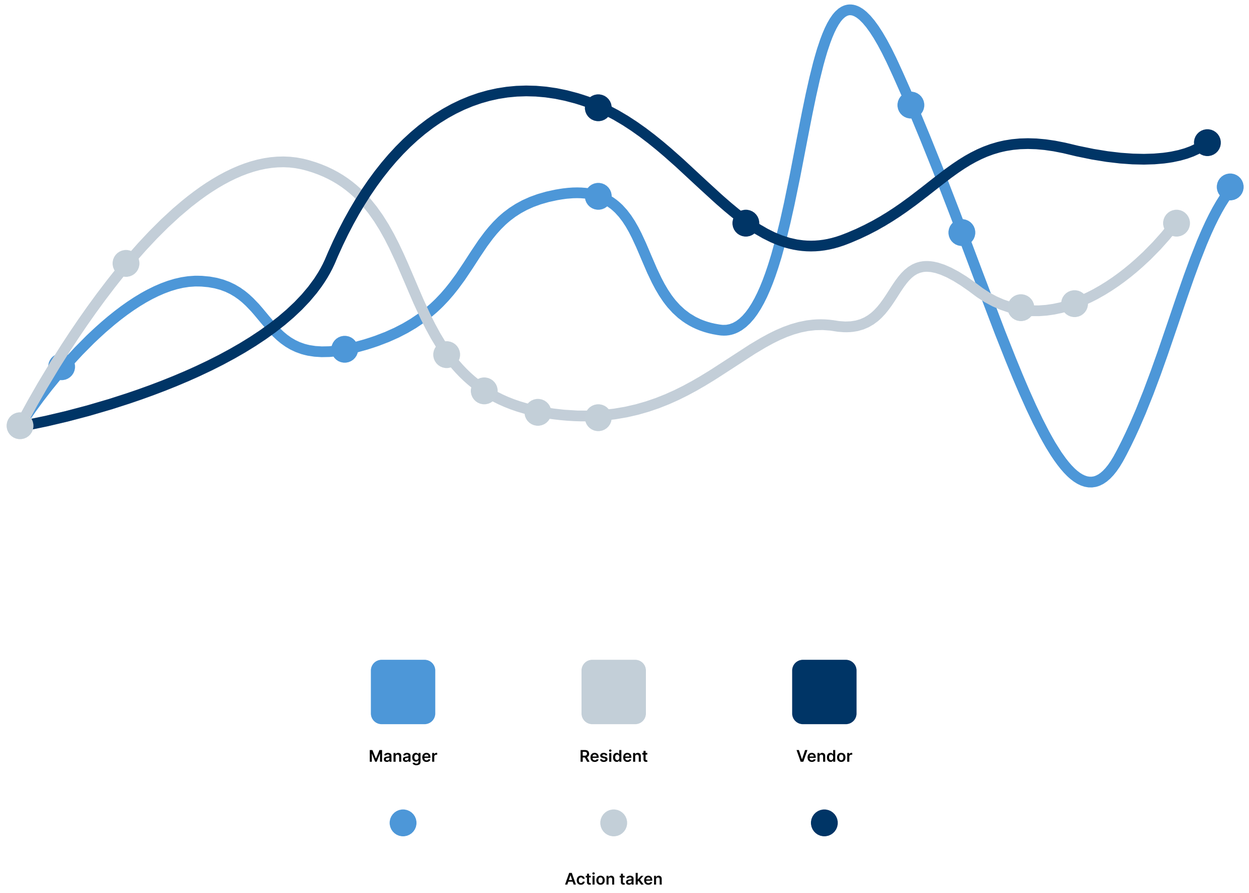
Weekly meetings with the co-founders created an exchange of ideas to better the odds of hitting the best solution.

Work orders are messy things.

We observed that the majority of inefficiencies focused on communication gaps, disorganized tracking, lack of prioritization, and unclear ownership.

We conducted around **seven initial interviews** focused on work order processes and what happened when they fail.

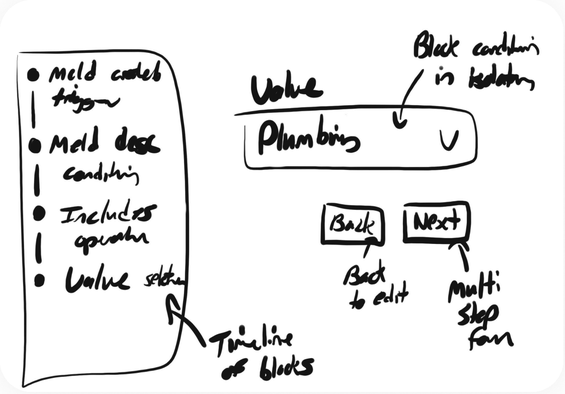
Our results showed that over half of property managers reported losing critical time due to disorganized workflows, **costing the industry millions annually**.



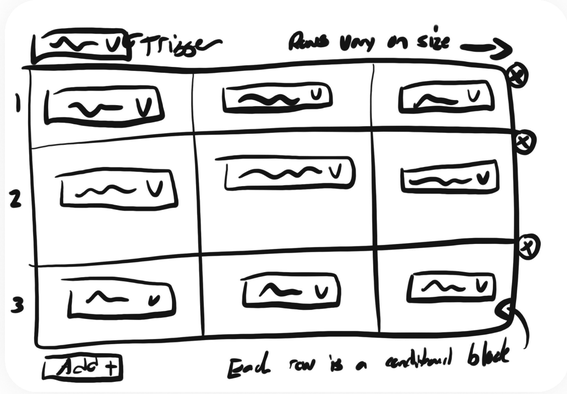
Attacking the problem from all directions

I passed along designs to the engineering, product, and the leadership teams. They effectively visualized workflows, but they also introduced significant usability and development challenges.

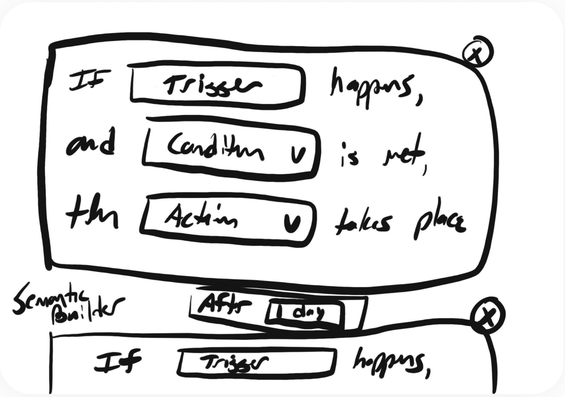
The team ultimately needed a simpler approach to meet technical feasibility and timeline constraints.



Too many steps to create simple or complex workflows



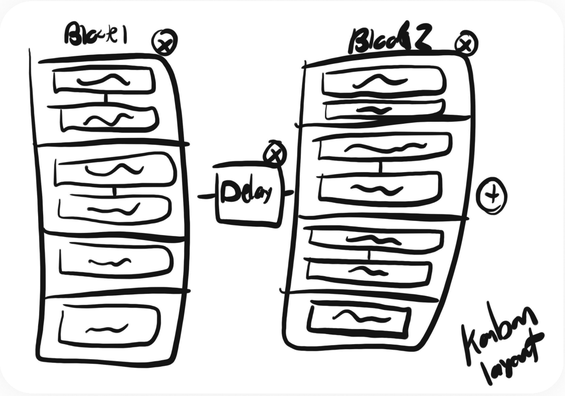
Too much cognitive load with horizontal scolling



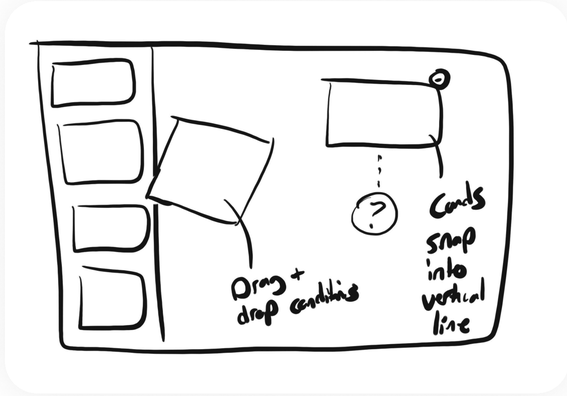
Deep nesting could have been a large challenge



Difficult to represent complex branching conditions



Execution flow felt too ambiguous to the team



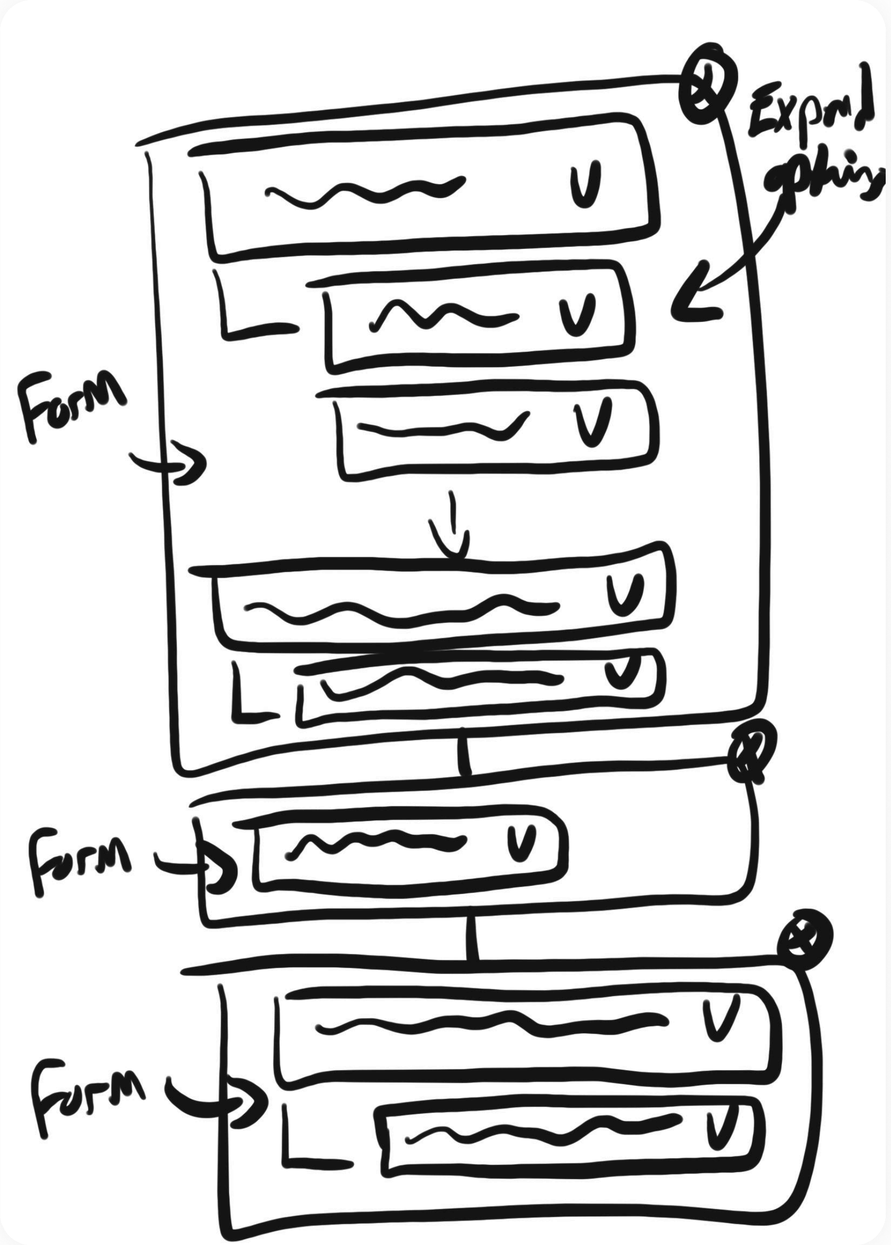
Too complex from a development perspective

A simple form based experience was picked

Using existing frameworks and familiar development patterns reduced engineering overhead and ensured we’d hit our timeline goals.

This approach provided a solid baseline that could evolve with future iterations (e.g., reordering, nested conditions).

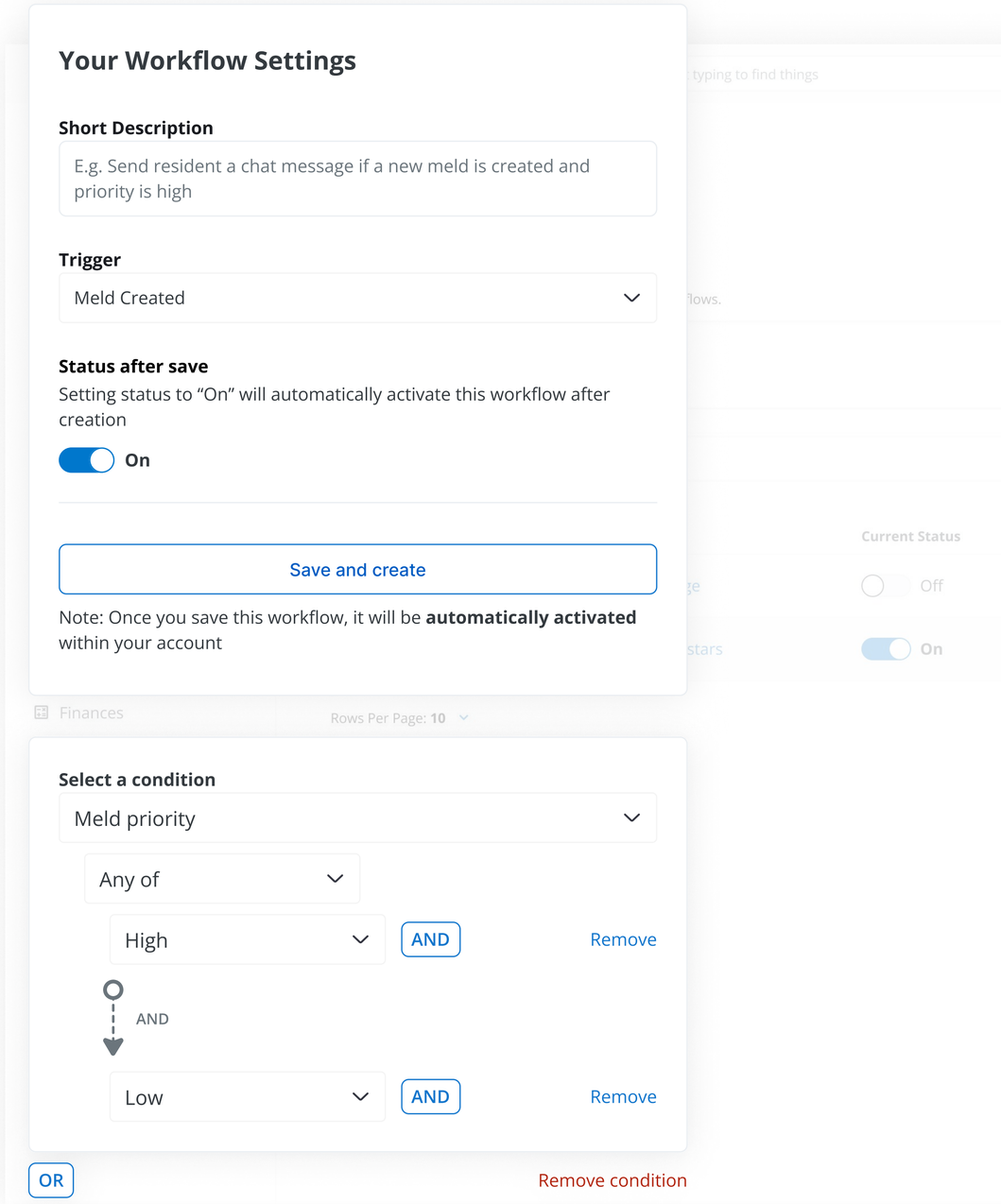
Minimized unexpected development challenges, ensuring a smooth handoff and delivery within the timeline.



A simple Workflows Engine was released.

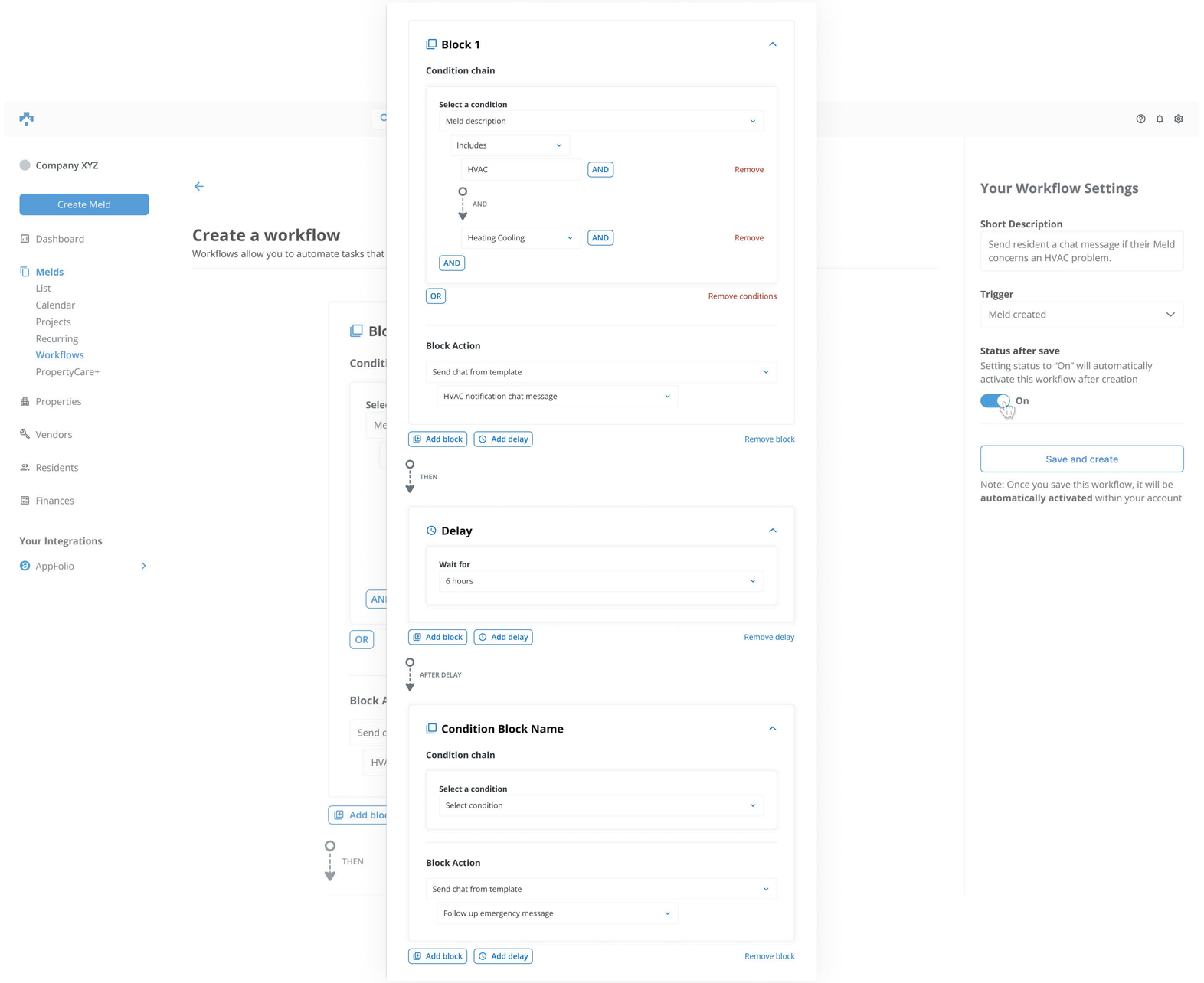
Allowing Sarah to create simple or complex workflows that can automate smaller tasks from her daily workload.

All focused on setting a chain of conditions that would fire off actions when those conditions were made.



Complex workflows all designed by the user. Fired off by a trigger event.

We added in delays to simulate what the real world would be like.

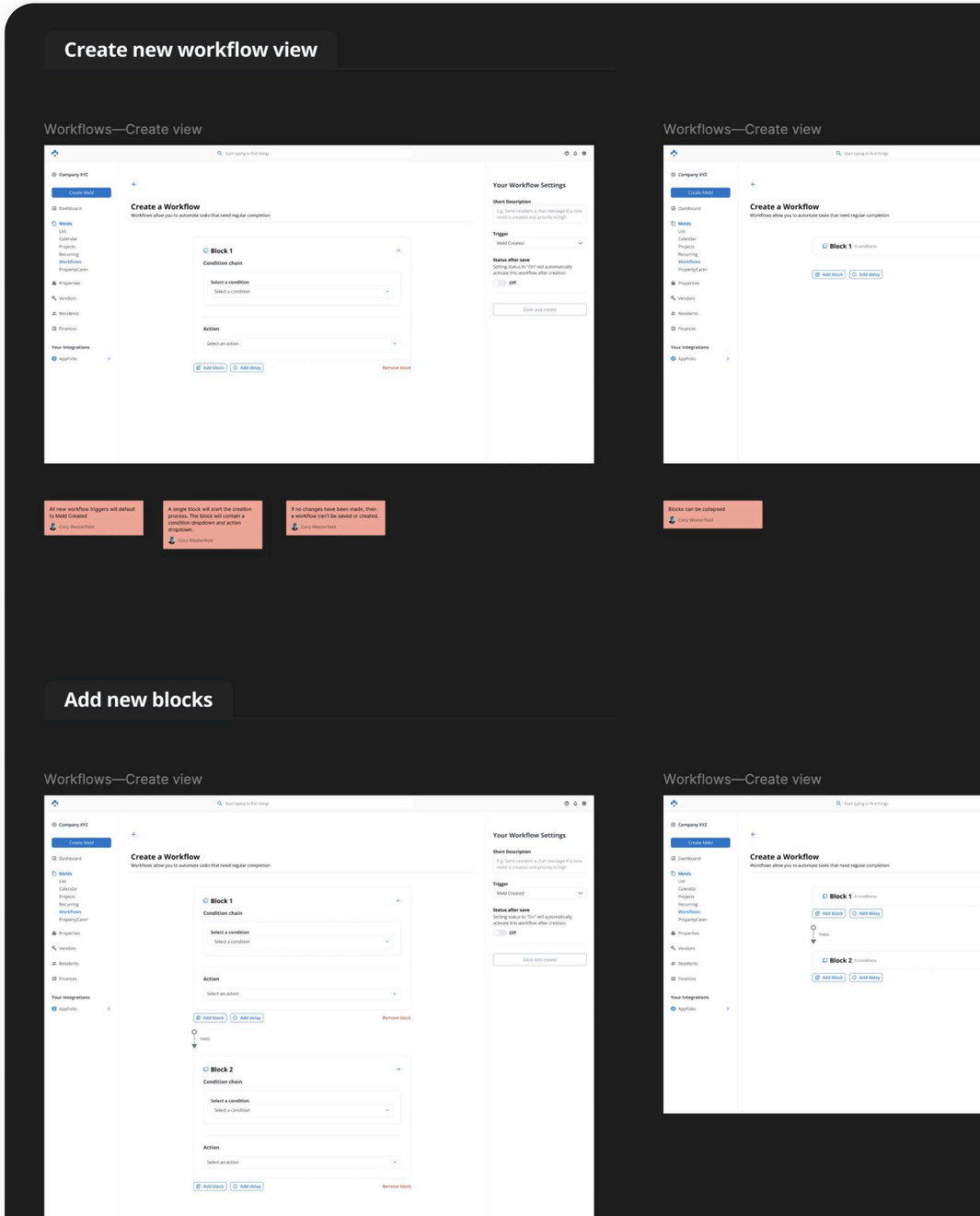


Structuring handoff for the dev team

An easy to navigate source of truth paired with regular checkins was key in helping our team succeed.

Design workflows were divided into smaller, manageable sections with notes to clarify interactions and logic.

I would hold regular check-ins and office hours with engineering to field any questions. This helped reduce back-and-forth during development.



We initially didn’t get the results we wanted.

But we found out one key thing that held us back: *Messaging and Education*.

As a company, we didn’t do a good enough job at communicating what workflows could do. Customers having never used an automated feature before were scared to break something on the platform.

Education on how to use the workflows feature came through focused learning lunch sessions that showed its power and ease of use for customers of all sizes.

Minimal
Manual tasks eliminated

~7%
Adoption rate after three months

3%
Work orders that were automated

<50
Unique active workflows

* Measured with Mode

9 month results

6 million+
Manual tasks eliminated

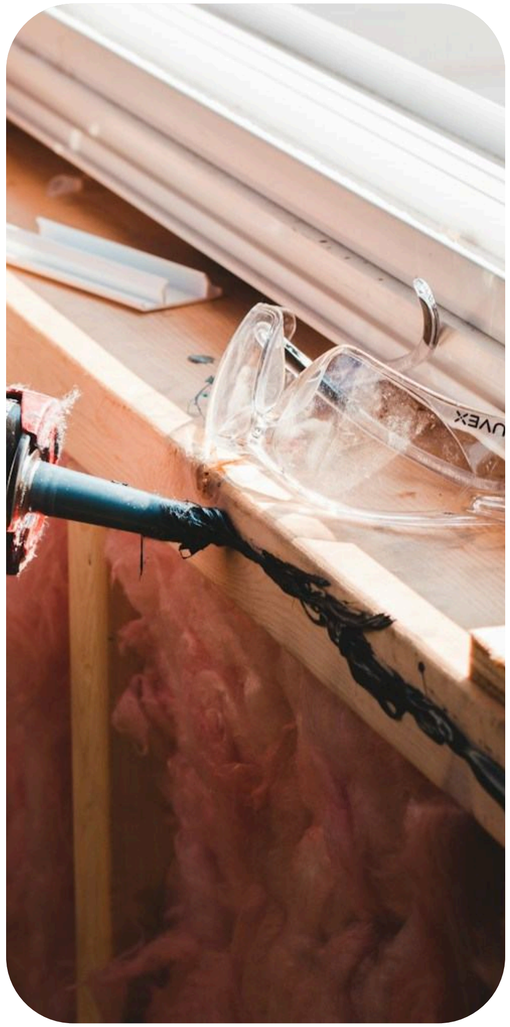
44%
Adoption rate in nine months

26%
Work orders that were automated

5000+
Unique active workflows

* Measured with Mode





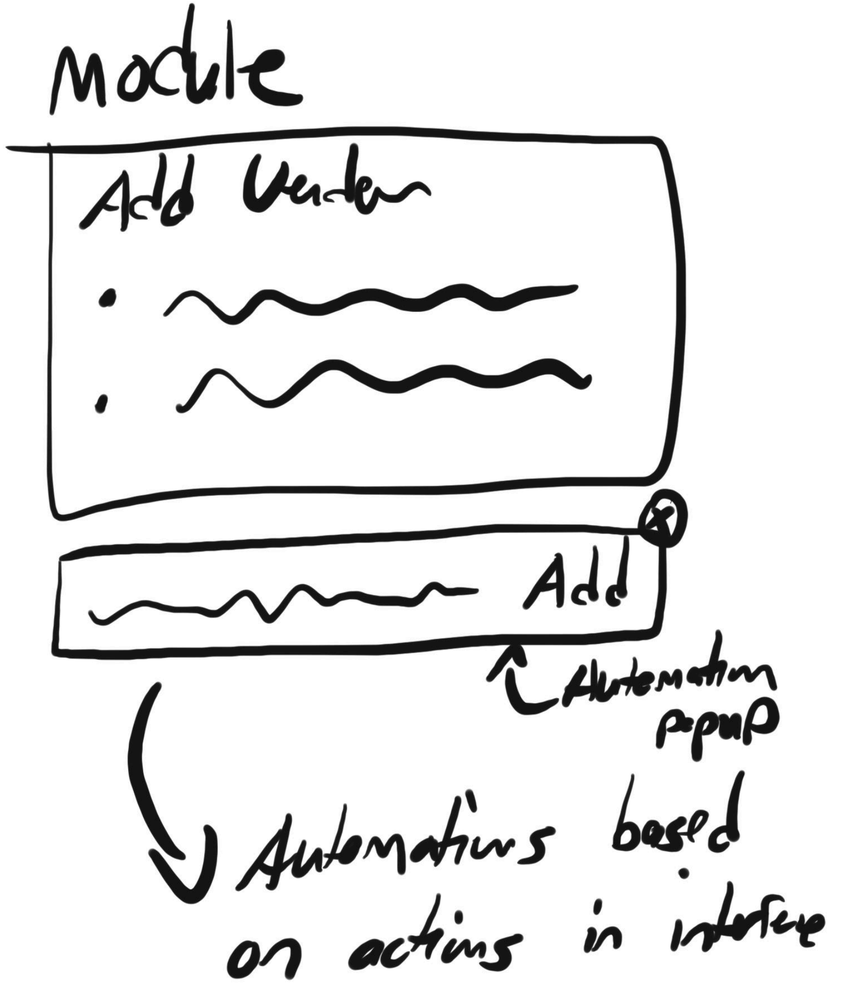


Imagining what's next for Workflows

Our next logical step would have focused on adding automation to user actions on the platform.

We imagined creating automation prompts that would pop up based on **an event-driven system** that could predict what would be beneficial to the user. *No editor would be required.*

The example on the right demonstrates assigning a specific certified vendor automatically when certain criteria are met within a work order.



The lasting impact for Property Meld

Releasing Workflows set the company apart in comparison to the rest of the industry. Automation was a new thing property managers had never seen.

The project helped the company believe that the product team could innovate quickly and effectively. And our innovations made it easier for the sales team to pull in more customers.

A **Series B investment** was locked down later in the year.

