

Project Roadmap & Milestones

Phase-by-phase delivery plan from Phase 1 kickoff through production go-live — 13 months, 5 phases, 40+ milestones.

PREPARED FOR	SPONSOR	BY	VERSION
Resortments	Russ · Owner	Webaroo	v3.0

Project Roadmap & Milestones

This roadmap is prepared to translate the Project Charter into a sequenced, time-boxed delivery plan — phase-by-phase, milestone-by-milestone, from Phase 1 kickoff through production go-live in 14 months. Our delivery cadence rests on four core imperatives:

- 1. Compress time-to-working-software.** Phase 1 delivers in **~120 days** — Foundation platform plus Land Division pilot — so Russ sees real parcels, real cost data, and a real workflow handoff by Month 4.
- 2. Sequence by operational ROI, not by organizational politics.** Wave 1 (Phase 2) tackles Legal Close Land, Material Procurement, and Plant Division — the three divisions with the highest documented pain points. Wave 2 (Phase 3) handles Field, Management/Leasing, and Legal Rollovers.
- 3. Build the foundational platform once; deliver division-specific modules iteratively across phases.** Auth, workflow engine, DMS, and the Accounting Hub schema ship in Phase 1. Every subsequent module extends that foundation — no re-architecting.
- 4. Mobile and advanced features follow a working web baseline.** iOS/Android apps ship in Phase 4 against a stable, battle-tested web platform — not simultaneously with it.

Project Vision: Build a comprehensive unified web and mobile platform serving 8 divisions of Resortments, replacing fragmented systems with integrated workflows, real-time visibility, and intelligent automation.

Scope: 8 divisions, 40+ users, 5 access tiers, enterprise-grade security, mobile-first field operations.

Phase 0: Discovery & Scoping

Timeline: March – April 2026

Status: In Progress

Sponsor: Russ (Resortments Owner)

Delivery: Webaroo (full platform design, development, and delivery)

Objectives

Complete stakeholder engagement, validate architecture, and secure formal scope sign-off.

Activities & Deliverables

ACTIVITY	STATUS	NOTES
Stakeholder interviews (8/8)	✓ Complete	Land, Legal Close Land, Material Procurement, ADP/Payroll, Field, Management/Leasing, Plant, Accounting Hub divisions complete
Accounting Hub interview	✓ Complete	Completed April 8, 2026; confirmed multi-entity QB, ADP payroll for 12 employees, cost allocation engine, 13-17 dev-months HIGH complexity
Current state audit	✓ Complete	Documented data silos, legacy systems, integration gaps
Architecture decision	✓ Complete	Microservices API, PostgreSQL, React/React Native, cloud infrastructure
Formal scope documents	🕒 In Progress	Division modules, data flows, integration requirements
Stakeholder sign-off	🕒 Pending	Obtain approval on scope, timeline, resource commitment

Key Decisions Made

- **Tech Stack:** Node.js/Express backend, PostgreSQL, React (web), React Native (mobile), AWS/GCP cloud deployment
- **Database Approach:** Unified schema with division-specific views; centralized Accounting Hub data model
- **Integration Priority:** QuickBooks (financial), RealPage/OneSite (leasing), DocuSign (closings), ADP (payroll)
- **Auth Strategy:** OAuth 2.0 + custom role-based access control (5 tiers)

Key Risks / Blockers

- **Accounting Hub:** Interview complete; scope confirmed and documented
- **RealPage API:** Unconfirmed access and data availability (critical for Leasing module)
- **Data Quality:** Scattered sources (email, OneDrive, sheets, phone notes); digitization needed

Milestone: Discovery Complete ✓

Gate Criteria: – All 8 stakeholder interviews complete – Formal scope document approved by leadership – Architecture & tech stack validated – Resource plan and budget baseline established – Phase 1 kickoff scheduled

Phase 1: Foundation / MVP

Timeline: May – August 2026 (4 months)

Payment: \$300,000 collected upfront at SOW signing — see Payment Schedule & Terms document

Owner: Webaroo Engineering Lead, Product Manager **Key Outcome:** Russ can log in, see Land Division parcels with real cost data, and verify one cross-division workflow handoff (Land → Legal Close) routing correctly

Core Components

1.1 AUTHENTICATION & AUTHORIZATION SYSTEM

- **SSO Integration** (OAuth 2.0, SAML support)
- **5-Tier Role-Based Access Control:**
 - Owner (Russ) — owner dashboard, all data, all actions
 - Executive (Russ as Owner/Executive; Johnny CPA as Accounting Lead) — view financial & operational dashboards
 - Manager (Division leads) — full access to division + cross-division reads
 - User (Operations staff) — division-specific read/write
 - Viewer (Consultants, vendors) — read-only curated views
- **Two-Factor Authentication (2FA)** — SMS + authenticator app options
- **Session Management** — token expiry, device tracking, login audit logs

1.2 CORE DATABASE SCHEMA DESIGN

- **Unified Data Model:**
 - Companies → Divisions → Projects → Transactions
 - Entities: Users, Roles, Permissions, Divisions, Projects, Documents, Audit Logs
- **Accounting Hub Schema:** GL Accounts, Cost Centers, Payment Methods, Transaction Ledger
- **Division Base Tables:** Asset/Property, Personnel, Contracts, Work Orders
- **Integration Tables:** QB sync state, RealPage cache, DocuSign envelope tracking
- **Data Retention:** 7-10 year archive tables for compliance

1.3 API LAYER ARCHITECTURE

- **RESTful API** (with GraphQL query layer for advanced uses)
- **Endpoints:** Auth, Users, Divisions, Projects, Documents, Accounting, Integrations
- **Rate Limiting & Throttling** — per-user quotas
- **Webhook Handlers** — inbound from RealPage, DocuSign, ADP
- **API Documentation** — auto-generated (Swagger/OpenAPI)

1.4 OWNER DASHBOARD (UNIFIED COMPANY / EXECUTIVE VIEW)

- **Real-Time KPIs:**
 - Active projects by division
 - Financial snapshot (revenue, costs, margin by division)
 - Document volume (pending, completed, overdue)
 - User activity feed
 - System health & integration status
- **Division Drill-Down:** Click to see full division analytics
- **Search & Filter:** Global search across all divisions and documents
- **Customizable Widgets:** Russ can configure what appears on home page

1.5 ACCOUNTING HUB MODULE

- **Central Financial Data Repository**
 - GL Account master, Cost Center structure
 - Chart of Accounts (aligned to QB)
 - Payment methods, bank accounts, credit cards

- **QuickBooks Integration:**
- Read GL accounts, cost centers
- Sync transactions (optional pull-only initially)
- Payment recording & reconciliation
- Monthly close reporting
- **Cash Flow Forecast** — 12-month rolling projection by division
- **Budget Tracking** — vs. actuals, variance analysis
- **Audit Trail** — all financial transactions logged with user/timestamp

1.6 BASIC WORKFLOW ENGINE

- **Division-to-Division Handoffs:**
- Land → Legal Close Land (handoff to David)
- Land → Material Procurement (draw orders trigger PO requests from Tracy)
- Field → Management/Leasing (completion triggers leaseback processing)
- **Workflow States:** Draft → Submitted → Approved → In Progress → Complete
- **Automated Triggers:** Email notifications, dashboard alerts, escalation rules
- **Audit Trail:** Who did what, when, and with what data

1.7 DOCUMENT MANAGEMENT SYSTEM (DMS)

- **Central Repository:**
- Upload, version control, full-text search
- Multi-format support (PDF, images, spreadsheets, videos)
- Access control per document
- **Integration Points:**
- DocuSign envelope lifecycle tracking
- QuickBooks receipt attachment
- RealPage document linking
- **Retention Policies:** Auto-archive after 7+ years
- **Comment & Annotation:** Mark up documents in-app

Phase 1 Deliverables

- Auth system deployed (SSO, 2FA, 5-tier RBAC)
- PostgreSQL schema v1.0 in production
- REST API fully documented, rate-limited
- Owner Dashboard fully functional
- Accounting Hub module live (QB read-only)
- Basic workflow engine deployed (Land → Legal, → Material)
- DMS with 10GB storage per user
- All systems monitored, alerting in place

Phase 1 Testing & Validation

Timeline: August 1 – August 31, 2026 (final month of Phase 1; must complete before MVP Launch milestone)

- **UAT:** Russ (Owner/Executive), Johnny CPA (Accounting Lead), Finance team validate Accounting Hub
- **Load Testing:** 40 concurrent users, 100K documents indexed
- **Security Audit:** Penetration testing, RBAC validation

- **Integration Testing:** Mock QB, RealPage, DocuSign flows

Milestone: MVP Launch ✓

Gate Criteria: – Russ logs in, sees unified data across all divisions – Auth system enterprise-ready (SSO, 2FA working) – Accounting Hub showing GL & cost data – Workflow engine routing tasks correctly – DMS storing and retrieving documents reliably – API stable under load (99.5% uptime) – All 40 users onboarded with access – Zero security findings from audit

Phase 2: Division Modules — Wave 1

Timeline: September – December 2026 (4 months) **Payment:** \$700,000 released on Phase 2 completion and UAT sign-off **Owner:** Webaroo Product & Engineering Teams **Parallel Workstreams:** Land & Legal Close Land; Material Procurement; Integrations (coordinated timing)

Why Wave 1: High-Priority, High-Impact Divisions

- **Land Division** (Russ's core): Drives revenue, highest pain points documented
- **Legal Close Land** (David): Directly connected to Land handoffs, David owns 2 divisions
- **Material Procurement** (Tracy): 2000+ POs annually; largest data volume challenge
- **Integrations:** ADP, DocuSign (foundational for all divisions)

2.1 Land Division Module

Owner: Russ

Key Processes: Site acquisition, financing, cost tracking, deliverables, closeout

DATA MODEL

- **Assets:** Property ID, address, acreage, legal description, acquisition date, cost
- **Financing:** Loan details, draw schedule, interest rates, lender, payment schedule
- **Costs:** Hard costs (land, construction), soft costs (legal, permits), contingency
- **Status Tracking:** Open, Under Development, Complete, Closed

WORKFLOWS

- **Acquisition to Closeout:** Site identified → Financing approved → Land purchased → Permits obtained → Closeout approved → Legal Close initiated
- **Cost Tracking:** Real-time cost rollup by category (hard, soft, contingency)
- **Draw Management:** Financing draws linked to milestones, payment recording

FEATURES

- **Property Dashboard:** Active sites, cost status, financing timeline
- **Cost Tracker:** Budget vs. actual, cost overruns, approval workflows
- **Document Linking:** Contracts, surveys, permits, appraisals
- **Financial Integration:** Costs flow to Accounting Hub GL

INTEGRATION

- → **Legal Close Land:** Triggers legal closing workflow for David
- → **Material Procurement:** Construction cost estimates trigger PO authorizations

SUCCESS METRICS

- Russ can see all active properties with real-time cost status
- 100% of financing draws recorded in system
- Cost overruns flagged automatically within 24 hours
- Handoff to Legal Close Land fully automated

2.2 Legal Close Land Module

Owner: David

Key Processes: Title work, closing mechanics, entity formation, post-closing filings

DATA MODEL

- **Closing Package:** Land property reference, parties, timeline, closing date
- **Title Search:** Abstract, title report, title insurance
- **Deed & Documents:** Prepared, signed, recorded
- **Entity Formation:** Corporate entity type, EIN, registered agent
- **Post-Closing:** Recording confirmation, CD&A (Commitment, Deed, & Affidavit), notice filing

WORKFLOWS

- **Closing Initiation:** Land Division signals site ready → Legal Close workflow starts
- **Document Preparation:** Title review → Deed drafted → Closing statement prepared
- **Signing & Recording:** Documents signed → Recorded with county → Confirmation
- **Post-Close:** Entity setup → IRS filing → Lender notification

FEATURES

- **Checklist View:** Closing document status (pending, signed, recorded, filed)
- **Timeline Tracker:** Key dates (abstract received, closing, recording, filing)
- **Integration with DocuSign:** Documents sent for signature, tracking envelope status
- **Title Company Link:** Request abstract, title insurance, coordinate closing

INTEGRATION

- ← **Land Division:** Receives handoff from Russ's team
- → **Management/Leasing:** After closing complete, property ready for leaseback

SUCCESS METRICS

- All closings tracked from initiation to post-close
- DocuSign envelopes created and tracked automatically
- Zero missed recording deadlines
- Post-close entity setup completed on schedule

2.3 Material Procurement Module

Owner: Tracy

Key Processes: Request → Quote → PO → Receipt → Invoice → Payment

DATA MODEL

- **Purchase Requests:** Requester, project, item description, quantity, budget
- **Vendors:** Vendor DB, pricing history, contract terms, payment terms

- **Purchase Orders:** PO#, vendor, items, quantities, unit prices, delivery date, cost
- **Receiving:** Receipt log, delivered items, quantity verification, quality inspection
- **Invoices:** Vendor invoice, PO match, line-item reconciliation
- **Payments:** Check/ACH, vendor account, reconciliation to GL

WORKFLOWS

- **Request Creation:** Land division needs materials → Tracy receives request → Approves → Creates PO
- **Vendor Quote:** 3-quote process for items >\$5K
- **PO Issuance:** Auto-numbered, sent to vendor via email/portal
- **Delivery Tracking:** Scheduled delivery, actual receipt, QA inspection
- **Invoice Matching:** 3-way match (PO ↔ Invoice ↔ Receipt), dispute resolution
- **Payment:** Auto-payment on net terms, accrual to GL

FEATURES

- **Vendor Master:** Searchable database, pricing tables, contact info, payment terms
- **PO Dashboard:** Open POs, aging analysis, overdue deliveries, cost trends
- **Receiving Station:** Mobile-friendly receipt entry, photo documentation
- **Invoice Portal:** Drag-and-drop invoice upload, 3-way match validation
- **Cost Analysis:** Spend by vendor, by category, price trends, savings tracking
- **Budget Integration:** Real-time commitment to GL cost centers

HIGH-VOLUME HANDLING

- **2000+ annual POs:** Batch import, bulk operations, bulk email distribution
- **100,000+ line items:** Fast search, filtering, export to Excel
- **Multi-location delivery:** Vendor dropdown, autocomplete address lookup
- **Duplicate detection:** System flags duplicate POs

INTEGRATION

- ← **Land Division:** Budget allocations, draw authorizations, line items
- → **Accounting Hub:** Costs flow to GL, accruals to balance sheet
- **Vendor Integration:** Email notifications, supplier portal (Phase 4)

SUCCESS METRICS

- All 2000+ annual POs created in system (no email-only POs)
- 3-way match pass rate >95%
- Delivery receipt within 2 days of arrival
- Invoice-to-payment cycle <30 days
- Real-time budget visibility across all projects

2.4 ADP Integration

Owner: Webaroo Integration Engineer

Key Data: Employee roster, payroll runs, taxes, benefits, time tracking

SCOPE

- **Inbound (ADP → Resortments):**
- Employee master (ID, name, email, department, cost center, manager)

- Payroll summary (gross, net, taxes, deductions)
- Time tracking (if available)
- Benefits enrollment, changes
- **Outbound (Resortments → ADP):**
- New hire setup (optional, MVP: manual)
- Termination notifications (optional)
- **Sync Cadence:** Daily for payroll, weekly for roster

FEATURES

- **Employee Directory:** Auto-synced from ADP, searchable by division/manager
- **Payroll Dashboard:** Monthly payroll summary, cost distribution to GL
- **Allocation Tracking:** Employee costs assigned to projects, cost centers
- **Manager View:** Reports of their direct reports, payroll details

SUCCESS METRICS

- Daily sync of ADP data with <5% failure rate
- 100% of payroll costs allocated to correct GL codes
- Employee directory always current (within 24 hours of ADP change)

2.5 DocuSign Integration

Owner: Webaroo Integration Engineer

Key Requirement: ~500 document types × ~20 closings = ~10,000 active envelopes annually

SCOPE

- **Inbound (DocuSign → Resortments):**
- Envelope creation, template linking
- Recipient tracking (sent, viewed, signed, declined)
- Signature capture, audit trail
- Completion/voiding events
- **Outbound (Resortments → DocuSign):**
- Envelope initiation (Legal Close module triggers deed signing)
- Template selection (deed, closing statement, affidavits)
- Recipient assignment (grantor, grantee, notary, witnesses)
- **Scale:** Queue management, rate limiting, bulk operations

FEATURES

- **Envelope Tracker:** View status of all envelopes, drill down to signers
- **Template Management:** Curated list of approved templates (deed, power of attorney, disclosure, etc.)
- **Integration with Legal Close Module:** Automatic envelope creation on workflow trigger
- **Bulk Sending:** Multi-envelope initiation for volume closings
- **Compliance:** Audit logs, signed copy storage in DMS

PERFORMANCE REQUIREMENTS

- **10,000 envelopes/year = ~27/day peak**
- **API rate limits:** Batch operations, exponential backoff
- **Retry logic:** Webhook delivery failures, queue recovery

- **Timeout handling:** Long-running signing sessions

SUCCESS METRICS

- Zero envelope delivery failures (99.9% uptime)
- Envelope status updates within 5 minutes of event
- Scale test: 500 envelopes/day without degradation
- <2% webhook delivery failures

Phase 2 Dependencies & Sequencing

Inputs from Phase 1 (must be stable before Phase 2 kickoff): Authentication, Database schema, API layer, Workflow engine, Document Management System, Accounting Hub schema, Land Division pilot.

Phase 2 modules and owners:

MODULE	DIVISION OWNER	DEPENDS ON	FEEDS INTO
Legal Close Land	David McDaniel	Phase 1 Land pilot (handoff trigger), DocuSign integration	Accounting Hub (closing financials)
Material Procurement	Tracy	Phase 1 Land pilot (cost flow), Accounting Hub (GL sync)	Phase 3 Plant Division (vendor + inventory data)
ADP Integration	Webaroo Eng	Accounting Hub	All division payroll roll-ups
DocuSign Integration	Webaroo Eng	Auth + DMS	Legal Close Land (envelope creation)

Outputs to Phase 3: All Phase 2 modules must reach UAT sign-off before Phase 3 kickoff. Field, Management/Leasing, Legal Rollovers, and Plant modules all consume data and workflows established in Phase 2.

Phase 2 Deliverables

- Land Division module fully operational
- Legal Close Land module fully operational
- Material Procurement module handling all 2000+ POs
- ADP integration syncing daily with <5% error rate
- DocuSign integration scale-tested to 500 envelopes/day
- All workflows between divisions automated
- Russ + David + Tracy can operate fully in system
- Finance can track all costs to GL

Milestone: Core Operational Divisions Live ✓

Gate Criteria: – Land module in production, no manual workarounds – Legal Close Land fully automated via DocuSign – Material Procurement: 100% of POs in system – ADP roster always current (within 24 hours) – All 3-way matches passing automatically – Financial data flowing cleanly to Accounting Hub – Russ can see real-time cost status across all 3 divisions – Zero critical defects in production

Phase 3: Division Modules — Wave 2

Timeline: January – March 2027 (3 months) **Payment:** \$700,000 released on Phase 3 completion and UAT sign-off

Owner: Webaroo Product & Engineering Teams

Dependencies: Phase 2 complete, Wave 1 divisions stable

Why Wave 2: Supporting Divisions + Special Cases

- **Plant Division** (Zac): New physical facility coming online; high complexity, lower urgency
- **Field Division** (Gerardo): Crew tracking, geo-fencing, asset management; mobile-critical
- **Management/Leasing** (Dylan): Largest portfolio; RealPage integration core dependency
- **Legal Rollovers** (David): Lightweight, complements his Land closings; David availability

3.1 Plant Division Module

Owner: Zac

Key Processes: Equipment procurement, maintenance scheduling, production planning, asset tracking

CONTEXT & ASSUMPTIONS

- **Plant not yet operational** (coming online during Phase 3)
- **Design must accommodate:** Future expansion, equipment additions, downtime scheduling
- **Key Integration:** ADP (staff assigned to plant), Material Procurement (spare parts), Accounting (OpEx tracking)

DATA MODEL

- **Assets:** Equipment ID, description, manufacturer, model, acquisition cost, depreciation schedule
- **Maintenance:** Scheduled vs. unscheduled, technician assignment, downtime duration
- **Production:** Scheduled production runs, actual output, efficiency metrics, scrap tracking
- **Inventory:** Spare parts inventory, reorder levels, vendor links
- **Staffing:** Crew assigned to plant shifts, cross-trained roles, capacity planning

WORKFLOWS

- **Equipment Procurement:** Zac requests equipment → Material Procurement sourcing → Asset added to system
- **Maintenance Scheduling:** Preventive vs. reactive, technician dispatch, downtime notification
- **Production Planning:** Weekly production schedule → Crew assignment → Execution → Actual report
- **Asset Lifecycle:** Acquisition → Commissioning → Maintenance → Depreciation → Disposal

FEATURES

- **Asset Dashboard:** Real-time equipment status, maintenance status, downtime tracking
- **Maintenance Schedule:** Preventive schedule, actual maintenance history, technician notes
- **Production Dashboard:** Daily production, actual vs. plan, efficiency metrics
- **Spare Parts Inventory:** Current levels, reorder triggers, vendor contacts
- **Integration with Material Procurement:** Equipment and spare parts sourced through Tracy

SUCCESS METRICS

- All plant assets tracked in system with depreciation schedules
- Maintenance schedule created and adhered to

- Production data capturing daily (or per-shift)
- Equipment downtime <5% unplanned (95%+ uptime on critical assets)

3.2 Field Division Module

Owner: Gerardo

Key Processes: Crew assignment, work orders, site inspections, geo-tracking, equipment allocation

DATA MODEL

- **Crews:** Crew ID, crew members, equipment assigned, certifications, home base
- **Work Orders:** Site location, scope, crew assignment, schedule, status, completion signature
- **Inspections:** Inspection type (safety, quality, compliance), inspector, date, findings, photo evidence
- **Assets:** Field equipment (tools, vehicles, trailers), location tracking, maintenance
- **Time & Attendance:** Daily time logs, site check-in/out, travel time, overtime
- **Compliance:** OSHA safety incidents, near-miss reports, corrective actions

WORKFLOWS

- **Work Order Creation:** Site needs work → Gerardo or manager creates WO → Assigns crew with skills
- **Crew Dispatch:** Route optimization, travel time calculation, asset assignment
- **On-Site Execution:** Check-in with geo-stamp, time logging, photo documentation, inspection
- **Completion & Sign-Off:** Site rep/customer signs completion, crew signs off, data synced
- **Compliance Tracking:** Incident reports, corrective action tracking, audit trail

FEATURES

- **Mobile App (iOS/Android):**
 - Work order list with directions to site
 - Real-time crew location (geo-fencing, asset tracking)
 - Time clock (check-in/out, task break-down)
 - Photo/video capture, annotation
 - Signature capture (site completion)
 - Offline mode with sync on reconnect
- **Web Dashboard (Gerardo):**
 - Real-time crew map view with location pins
 - Work order board (unassigned, in-progress, completed)
 - Crew utilization and productivity metrics
 - Incident & compliance tracker
 - Cost allocation (labor + equipment by site)
- **Geo-Fencing:**
 - Define site boundaries
 - Auto check-in when crew arrives, check-out on departure
 - Alert if crew leaves designated area

INTEGRATION POINTS

- ← **Land Division:** New sites trigger Field work (site prep, inspections)
- ← **Material Procurement:** Field supplies (tools, consumables) ordered through Tracy
- ← **Accounting Hub:** Labor costs (ADP integration) + equipment costs → GL
- → **Management/Leasing:** Field completion triggers leaseback processing (Dylan)

SUCCESS METRICS

- 100% of work orders created in system (no paper dispatch)
- Real-time crew location within 100ft accuracy
- Check-in/out captured 95%+ of time
- Mobile app >99% uptime in field (with offline support)
- Site completion signed by Gerardo + site rep on every project

3.3 Management/Leasing Module

Owner: Dylan

Key Processes: Lease structuring, tenant management, rent collection, property accounting, RealPage integration

CONTEXT & CRITICALITY

- **Largest portfolio** in Resortments (most active properties)
- **RealPage/OneSite dependency:** Platform manages leases, rent, tenant communications
- **Integration criticality:** RealPage API unconfirmed; contingency needed
- **High complexity:** Multiple lease types, rent structures, special terms, vendor coordination

DATA MODEL

- **Properties/Units:** Asset from Land Division, address, unit count, rent roll, amenities
- **Leases:** Lease ID, tenant, unit, rent amount, term (start/end), lease type (residential, commercial), special terms
- **Rent Roll:** Current tenant, rent amount, rent status (paid, due, past due), lease end date
- **Tenants:** Contact info, credit, signed documents, move-in/move-out dates
- **Maintenance Requests:** Tenant request, description, priority, assigned vendor, completion status
- **Financials:** Monthly rent collected, vacancy rates, occupancy %, maintenance costs, net operating income (NOI)

WORKFLOWS

- **New Property Leaseback:** Received from Legal Close Land → Create property in RealPage/Resortments → Marketing
- **Lease Execution:** Prospect identified → Lease drafted (DocuSign) → Signed → Tenant move-in
- **Rent Collection:** Monthly rent due → Tenant payment → Reconcile to GL
- **Maintenance:** Tenant request → Dylan assigns vendor → Vendor completes → Invoice matches to GL
- **Turnover:** Tenant move-out → Lease ends → Unit inspected → Unit prepared → Ready for next tenant

FEATURES

- **Property Dashboard:** Portfolio overview, occupancy rate, rent roll status, YTD financials
- **Lease Management:** Master lease list, lease expiration alerts, renewal tracking
- **Rent Roll:** Real-time rent status (paid, due, past-due), aging, collection rate
- **Tenant Portal:** View lease, pay rent, submit maintenance requests (Phase 4)
- **Maintenance Tracker:** Request → Assignment → Completion, linked to vendor invoices
- **Financials:** Monthly NOI calculation, variance from budget, comparison period-over-period
- **RealPage Sync:** Bi-directional sync of leases, rent, tenants, maintenance (if API available)

REALPAGE INTEGRATION CHALLENGE

- **Current State:** API access unconfirmed; platform is critical to Dylan's operations

- **MVP Approach (Phase 3):** RealPage as source-of-truth; Resortments mirrors data (one-way read)
- **Phase 4+ Goal:** Bi-directional sync if API confirmed
- **Fallback:** Manual upload of rent roll CSV daily if no API

INTEGRATION POINTS

- ← **Legal Close Land:** New properties from David's closings
- ← **Field Division:** Maintenance requests from Gerardo's team
- ← **Material Procurement:** Maintenance supplies (paint, fixtures) ordered through Tracy
- ← **Accounting Hub:** Rent revenue, NOI calculation, lease accounting

SUCCESS METRICS

- 100% of leases tracked in system
- Rent collection tracked to GL daily
- RealPage sync (if available): <5% daily failure rate
- Maintenance requests routed to field within 24 hours
- Vacancy rate tracked in real-time

3.4 Legal Rollovers Module

Owner: David

Key Processes: Post-closing tax filings, entity management, annual compliance filings, document retention

CONTEXT & SCOPE

- **Lightweight compared to Legal Close Land**
- **Mostly integrations:** RealPage lookup, filing calendars, document linking
- **David availability:** Works alongside his Legal Close Land responsibilities
- **Rollover period management:** Tax year, annual renewals, multi-year tracking

DATA MODEL

- **Closed Properties:** Cross-reference to Legal Close Land closings
- **Tax Filings:** Form type (1099-NEC, K-1, partnership return), due date, status (draft, filed, confirmed)
- **Entity Compliance:** Annual report, franchise tax, commercial license renewals
- **Document Storage:** Closing docs, tax docs, entity filings, retention schedule

WORKFLOWS

- **Annual Rollover:** Year-end → Due dates calculated → Notifications → David prepares filings
- **Filing Submission:** Prepared filing → Submitted to agency → Confirmation tracked
- **Compliance Calendar:** System flags due dates 30/15/7 days in advance

FEATURES

- **Compliance Calendar:** All due dates by entity, jurisdiction, document type
- **Filing Status Tracker:** Draft → Submitted → Confirmed with filing receipt
- **Tax Return Linkage:** Tie filing to closed properties, supporting docs attached
- **Document Archive:** Long-term storage, 10-year retention for audit

SUCCESS METRICS

- Zero missed filing deadlines

- All tax filings tracked from preparation through confirmation
- Document retention compliant with 10-year requirements

Phase 3 Dependencies & Sequencing

Inputs from Phase 2 (must be stable before Phase 3 kickoff): Land Division (Phase 1 pilot, hardened), Legal Close Land, Material Procurement, ADP integration, DocuSign integration.

Phase 3 modules and owners:

MODULE	DIVISION OWNER	DEPENDS ON	FEEDS INTO
Plant Division	Zac	Material Procurement (equipment + inventory)	Field Division (production handoff), Management/Leasing (unit availability)
Field Division	Gerardo	Plant Division (production schedule), Land Division (site data)	Management/Leasing (delivery completion → unit ready to lease)
Management / Leasing	Dylan	Field Division (unit ready), RealPage one-way read	Legal Rollovers (renewal/eviction triggers)
Legal Rollovers	David McDaniel	Management/Leasing (lease lifecycle data)	Phase 4 Owner Dashboard reporting

Outputs to Phase 4: All 8 division modules operational in production. Phase 4 layers mobile apps (Field, Plant, Management), advanced RealPage integration, and the Owner Dashboard on top of the now-complete platform.

Phase 3 Deliverables

- Plant Division module with full asset tracking and maintenance scheduling
- Field Division mobile app (iOS/Android) with geo-tracking, time clock, offline support
- Management/Leasing module with full rent roll and RealPage integration (one-way, at minimum)
- Legal Rollovers compliance calendar and filing tracker
- All 8 divisions operational in platform
- Cross-divisional workflows automated end-to-end
- Mobile workforce (Field) productive in field (>95% uptime)

Milestone: All 8 Divisions Live ✓

Gate Criteria: – All 8 division modules in production – Field Division mobile app live with 90%+ field adoption – RealPage data flowing (one-way minimum) – Plant Division tracking all assets and maintenance – Legal Rollovers meeting all compliance deadlines – Cross-division workflows automated, zero manual handoffs – Russ has complete visibility across all divisions – All 40 users trained and productive

Phase 4: Mobile + Advanced Features

Timeline: April – June 2027 (3 months) **Go-Live:** End of June 2027 **Payment:** – \$490,000 released on Phase 4 completion / UAT sign-off (acceptance of Phase 4 deliverables) – \$470,000 released on production go-live + 30-day stabilization (no unresolved Severity 1 incidents open >24h) – \$140,000 retention released 60 days after go-live (final acceptance)

Owner: Webaroo Mobile Team, Product & Engineering

Dependencies: Phase 3 complete, all divisions stable

4.1 Native Mobile Apps (iOS & Android)

Focus: Field operations, real-time connectivity, offline-first design

CORE FEATURES (BOTH PLATFORMS)

- **Work Order Management**
 - View assigned work orders with directions
 - Real-time location updates (geo-fencing integration)
 - Check-in/check-out with time clock
 - Photo/video capture with annotations
 - Material & tool logging
 - Signature capture (customer sign-off)
- **Inventory Access**
 - View available tools/equipment
 - Log tool usage, damage, maintenance
 - Barcode scanning for asset tracking
- **Time Tracking**
 - Daily time log, break tracking
 - Overtime calculation
 - Project allocation
- **Documents**
 - View work order documents, drawings, specifications
 - Mark up in-app (PDF annotation)
 - Download for offline reference
- **Communication**
 - Two-way messaging with Gerardo/manager
 - Photo/video attachments
 - Real-time notifications
- **Offline Mode**
 - Full work order access without connectivity
 - Data sync on reconnection
 - Conflict resolution for overlapping edits

IOS APP SPECIFICS

- **Target:** iPhone + iPad (multi-device login)
- **Deployment:** Apple App Store
- **Tech Stack:** React Native or native Swift
- **Requirements:** iOS 14+, iPhone storage >100MB free

ANDROID APP SPECIFICS

- **Target:** Android phones and tablets
- **Deployment:** Google Play Store
- **Tech Stack:** React Native or native Kotlin

- **Requirements:** Android 9+, 100MB free storage

LAUNCH METRICS

- Both apps in respective app stores
- 35+ field users active on mobile (95% of field team)

-  99% uptime in field (with offline support)

- Completion signature capture 100% digital (zero paper)
- Crew productivity increase 15%+ vs. manual processes

4.2 Advanced Reporting & Analytics

Audience: Russ (owner), CFO, division leads, board

EXECUTIVE DASHBOARD

- **KPI Cards:** Revenue, cost, margin, cash flow, ROI by division
- **Trend Charts:** 12-month rolling, year-over-year comparison
- **Heatmaps:** Property performance, crew utilization, project profitability
- **Drill-Down Capability:** Click any metric to see underlying data
- **Custom Reports:** Saved filters, export to Excel, PDF generation

OPERATIONAL REPORTS

- **Project Profitability:** Budget vs. actual, margin by project
- **Cost Analysis:** Spend by vendor, category, time period
- **Cash Flow Forecast:** 12-month projection, scenario analysis
- **Utilization Reports:** Crew hours, equipment usage, asset availability
- **Compliance Reports:** Safety incidents, audit trails, document retention verification

AD-HOC QUERY TOOL

- **Data Warehouse:** All transactional data (read-only)
- **Query Builder:** Non-technical users can create custom reports
- **Saved Queries:** Reusable report templates
- **Scheduled Reports:** Auto-delivery to email on cadence (daily, weekly, monthly)

4.3 NLP Data Agent (Dylan's Request)



Out of Phase 4 core scope — candidate for Phase 5 Optimization or separate SOW. Not in Charter scope; preserved here to document the product vision.

Goal: Natural language queries against enterprise data; "Ask the system anything"

CAPABILITIES

- **Natural Language Queries:**
 - "What was our rent collection rate last month?"
 - "Which sites are over budget?"
 - "Show me all pending maintenance requests by priority."

- **Intent Recognition:** System determines query type (financial, operational, compliance, etc.)
- **Answer Generation:** Pulls data, formats response, provides sources
- **Follow-Up Support:** "Tell me more", drill-down to underlying data

IMPLEMENTATION APPROACH

- **LLM Integration:** OpenAI GPT, Anthropic Claude, or on-premise LLM
- **Query Parsing:** Map natural language → SQL/GraphQL query
- **Safety Controls:** Enforce user permissions (don't expose data they can't see)
- **Audit Trail:** Log all queries for compliance
- **Feedback Loop:** User corrects misinterpretations to improve accuracy

MVP SCOPE

- **Financial queries:** Revenue, costs, margins, cash flow
- **Operational queries:** Project status, crew location, work orders
- **Compliance queries:** Document status, retention, filing dates
- **Supported Responses:** Tables, charts, text summaries

4.4 Additional Integrations (Vendor Portals)



Out of Phase 4 core scope — candidate for Phase 5 Optimization or separate SOW. Not in Charter scope; preserved here to document the product vision.

Scope: Self-service vendor interfaces for procurement and service delivery

MATERIAL PROCUREMENT VENDOR PORTAL

- **Vendor Access:** Login with unique credentials
- **PO Visibility:** View assigned POs, specifications, delivery schedules
- **Delivery Notification:** Upload proof of delivery, photos, signatures
- **Invoice Submission:** Digital invoice submission (with PO auto-matching)
- **Communication:** Two-way messaging with Tracy
- **Feedback:** Performance ratings, issue resolution

SERVICE VENDOR PORTAL (FIELD, MAINTENANCE)

- **Work Order Assignment:** View assigned work orders with full details
- **Completion Tracking:** Mark tasks complete, submit photos, notes
- **Invoice Submission:** Submit work invoices against completed orders
- **Communication:** Real-time messaging with Gerardo/Dylan

COMPSYS INTEGRATION

- **Purpose:** Compliance data aggregation (permits, inspections, regulatory filings)
- **Data Flow:** Inbound — sync compliance status, notices, violations
- **Use Case:** Alerting Russ to regulatory issues, audit trail for inspections

HELLO DATA INTEGRATION



Deferred — Phase 5 candidate. Removed from Phase 4 core deliverables per Charter.

- **Purpose:** Data analytics partner (future advanced analytics)
- **Data Flow:** Read-only access to transactional data for warehousing/BI
- **Use Case:** Third-party analysis, benchmarking, industry comparison

TREASURY INTEGRATION (FINANCE)



Out of Phase 4 core scope — candidate for Phase 5 Optimization or separate SOW. Not in Charter scope.

- **Purpose:** Cash management, payment processing, reconciliation
- **Data Flow:** Payment submission, reconciliation, multi-currency support (if applicable)
- **Use Case:** Centralized payment hub, treasury reporting

Phase 4 Deliverables

- iOS app in Apple App Store, 100+ downloads
- Android app in Google Play Store, 100+ downloads
- Mobile adoption 95% of field team within 30 days
- Executive dashboard with all KPIs and drill-down
- Operational reporting library (20+ standard reports)
- NLP data agent — out of Phase 4 core scope (Phase 5 / separate SOW candidate)
- Vendor portal — out of Phase 4 core scope (Phase 5 / separate SOW candidate)
- Compsys integration syncing daily (Hello Data and Treasury deferred — Phase 5 candidates)

Milestone: Full Platform with Mobile ✓

Gate Criteria: – Mobile apps live and widely adopted (90%+ field team) – Advanced reporting reducing manual report generation by 80% – NLP agent (if pulled forward via separate SOW) enabling self-service analytics – otherwise deferred to Phase 5 – Vendor portals (if pulled forward via separate SOW) reducing admin overhead – otherwise deferred to Phase 5 – In-scope integrations stable and daily-syncing (Hello Data / Treasury deferred) – Platform achieving target SLAs: 99.5% web uptime, 99% mobile uptime – User satisfaction >4/5 across all divisions

Phase 5: Optimization & Maturity

Timeline: July 2027+ (ongoing; Phase 5 absorbs NLP Data Agent, Vendor Portals, Hello Data, and Treasury Integration deferred from Phase 4)

Owner: Webaroo + Resortments IT team

Dependencies: Phase 4 complete, platform production-ready

5.1 AI & Intelligent Automation Features

- **Document Intelligence:**
 - Auto-parsing of uploaded invoices, contracts, permits
 - Entity extraction (vendor names, amounts, due dates)
 - Classification (receipt, invoice, permit, license)
 - Language model tagging and categorization
- **Blocker Detection:**

- Predictive analytics on project delays
- Risk flagging (cost overruns, schedule slips)
- Recommendation engine (propose corrective actions)
- **Predictive Analytics:**
- Forecast cash flow based on historical patterns
- Predict rent collection risk by tenant
- Maintenance need prediction (equipment failure forecasting)
- **Intelligent Routing:**
- Auto-assign work orders based on crew skills & location
- Dynamic crew scheduling optimization
- Load balancing across Field teams

5.2 External Vendor/Contractor Portal

- **Self-Onboarding:** Vendors register, submit credentials, insurance, W-9
- **Job Marketplace:** Browse available work, submit bids, track assigned projects
- **Communication Hub:** Project messaging, document exchange
- **Performance Tracking:** Ratings, reviews, repeat business optimization
- **Payment & 1099 Reporting:** Self-service invoice submission, payment tracking, 1099 generation

5.3 Performance & Scalability Optimization

- **Database Tuning:**
- Index optimization for large tables (Material Procurement, Leasing)
- Partitioning for historical data (7-year archive)
- Query performance monitoring and optimization
- **Caching Strategy:**
- Redis caching for frequently accessed data (property lists, user profiles)
- CDN for static assets (photos, documents)
- Intelligent cache invalidation
- **Mobile Optimization:**
- App size reduction, lazy loading
- Compressed photo/video transmission
- Battery optimization for continuous geo-tracking
- **Infrastructure Scaling:**
- Load balancing across API servers
- Database replica for read-heavy reporting
- Auto-scaling for seasonal peaks (summer construction season)

5.4 Advanced Automation & Workflow Rules

- **Rules Engine:**
- Conditional workflows (If cost > \$10K, then require VP approval)
- Multi-step approval chains with escalation
- Automated reassignment on user unavailability
- **Integration Workflows:**
- Bi-directional syncs with advanced conflict resolution
- Scheduled batch operations (nightly reconciliation, weekly close)

- Error handling and retry logic
- **External Triggers:**
- Webhook support from third-party systems (RealPage events, ADP payroll runs)
- Email-triggered actions (invoice from new vendor)
- Time-based triggers (monthly close, quarterly reporting)

5.5 Continuous Improvement & Support

- **User Feedback Loop:**
- In-app feature request voting
- NPS surveys and usability testing
- Monthly product updates based on usage analytics
- **Training & Enablement:**
- Role-based training materials (video, docs, interactive guides)
- New user onboarding certification
- Monthly lunch-and-learns with product team
- **Maintenance & SLA Management:**
- 99.95% uptime SLA commitment
- Monitored incident response <1 hour for critical issues
- Quarterly security audits
- Annual disaster recovery testing

Phase 5 Success Metrics

- Platform uptime 99.95%+ consistently
 - Document parsing accuracy 95%+
 - Blocker detection preventing 80%+ of schedule delays
 - Vendor portal adoption 100% of active vendors
 - User satisfaction maintaining >4.2/5 NPS
 - Stretch goal: measurable cost reduction per division, baseline established in Phase 1 discovery
 - Time-to-decision reduced by 50%+ via NLP agent and analytics
-

Milestone Summary & Timeline

Phase	Start	End	Duration	Key Milestone
Phase 0 — Scoping	Mar 15, 2026	Apr 30, 2026	6.5 weeks	Discovery Complete (Apr 30, 2026)
Phase 1 — Foundation / MVP	May 1, 2026	Aug 31, 2026	4 months	MVP Launch (Aug 31, 2026)
Phase 2 — Wave 1	Sep 1, 2026	Dec 31, 2026	4 months	Wave 1 Live (Dec 31, 2026)
Phase 3 — Wave 2	Jan 1, 2027	Mar 31, 2027	3 months	All 8 Divisions Live (Mar 31, 2027)
Phase 4 — Mobile + Advanced	Apr 1, 2027	Jun 30, 2027	3 months	Go-Live: Mobile + Advanced (Jun 30, 2027)
Phase 5 — Optimization	Jul 1, 2027	Ongoing	Continuous	Steady-state operation & enhancements

Phase	Timeline	Key Outcome	Owner	Status
0: Scoping	Mar – Apr 2026	Formal scope, architecture, resource plan	Russ + Webaroo	In Progress
1: MVP	May – Aug 2026 (4 mo)	Russ logs in, sees unified data	Webaroo Eng	Pending kickoff
2: Wave 1	Sep – Dec 2026 (4 mo)	Land, Legal, Procurement, Integrations live	Webaroo Eng	Pending Phase 1
3: Wave 2	Jan – Mar 2027 (3 mo)	Plant, Field, Leasing, Rollovers live	Webaroo Eng	Pending Phase 2
4: Mobile	Apr – Jun 2027 (3 mo)	iOS/Android, Executive dashboard, go-live end of June 2027	Webaroo Eng	Pending Phase 3
5: Optimization	Jul 2027+	AI, NLP agent, Vendor portals, Hello Data, Treasury, Performance tuning	Webaroo + IT	Ongoing

Key Dependencies & Risk Mitigation

Critical Path Dependencies

- 1. Phase 1 → Phase 2: MVP foundation stable (Auth, DB, API, Acct Hub) before Wave 1
- 2. Phase 2 → Phase 3: Land + Legal Close stable before Field/Leasing operational
- 3. RealPage API: Unconfirmed; Leasing module contingency = CSV upload if API unavailable
- 4. Accounting Hub Interview: Complete (April 8, 2026); financial data model confirmed
- 5. DocuSign Scale: 10,000 envelopes/year; load testing critical before Phase 2 production

Decision Gates (Approval Required to Proceed)

- **End of Phase 0:** Scope signed off by Russ + Leadership (decision point: Full platform vs. phased)
- **End of Phase 1:** MVP stable for 2 weeks (decision point: Proceed to Wave 1 on schedule)
- **End of Phase 2:** Wave 1 divisions profitable within platform (decision point: Pause for optimization vs. proceed to Wave 2)
- **RealPage API Decision:** Q2 2026 (decision point: Invest in bi-directional sync vs. CSV fallback)
- **Mobile Launch Decision:** Q2 2027 (decision point: Immediate full launch vs. beta with select crew)

Risk Mitigation Summary

RISK	MITIGATION	OWNER
RealPage API unconfirmed	Design Leasing module with CSV fallback; test integration by Q1 2027	Webaroo Eng
Accounting Hub scope unclear	Complete interview Q2 2026; add financial lead to core team	Russ
DocuSign scale (10K envelopes)	Load testing 500/day in Phase 2; queue management + exponential backoff	Webaroo Eng
Plant doesn't exist yet	Design modular asset tracking; validate with Zac monthly during Phase 3	Zac + Webaroo Eng
Data digitization (Dallas invoices)	Budget OCR service; begin scanning Q2 2026 for Phase 1 testing	Russ + Finance
Change management (8 divisions)	Assign division champions; monthly training + support; measure adoption metrics	Webaroo PM
Key person dependency (Russ)	Document all decision-making; create wiki of business rules; groom backup owner	Russ + PM

Resource & Team Structure

Webaroo Core Team (Estimated FTE)

ROLE	PHASE 0	PHASE 1	PHASE 2	PHASE 3	PHASE 4	PHASE 5
Product Manager	0.5	1.0	1.0	1.0	1.0	0.5
Engineering Lead	0.5	1.0	1.0	1.0	1.0	0.5
Full-Stack Engineers	1.0	4.0	4.0	3.0	2.0	2.0
Mobile Developers	—	—	—	0.5	2.0	1.0
QA / Test	0.5	1.5	1.5	1.5	1.0	0.5
DevOps / Infra	0.5	1.0	1.0	1.0	0.5	0.5
Designer / UX	0.5	1.0	1.0	0.5	1.0	0.5
Data / Analytics	—	—	0.5	0.5	1.0	1.0
Total Webaroo FTE	3.5	10.0	10.5	9.5	8.5	6.0

Resortments Stakeholder Engagement

DIVISION	KEY STAKEHOLDER	ROLE IN DELIVERY	AVAILABILITY
Owner	Russ	Project sponsor, approvals, vision	High
Finance	Johnny CPA (Accounting Lead)	Accounting Hub owner, GL mapping	Medium
Land	Russ (Owner)	Module champion, data source	High
Legal Close	David	Module champion, DocuSign config	Medium
Procurement	Tracy	Module champion, vendor management	High
Plant	Zac	Future asset owner, maintenance planning	Low (ramps up Phase 3)
Field	Gerardo	Mobile champion, crew logistics	Medium
Leasing	Dylan	RealPage liaison, module champion	High

Success Criteria & Acceptance

Phase 0 Complete

- All 8 division stakeholder interviews complete
- Formal Scope of Work document signed by Russ (Owner/Executive) + Johnny CPA (Accounting Lead)
- Architecture & tech stack approved by Webaroo + IT

- Budget & resource plan approved
- Phase 1 backlog refined and estimated
- Team fully assembled and onboarded

Phase 1 Complete

- 40 users can log in with SSO + 2FA
- Owner Dashboard accessible with unified data view
- Accounting Hub syncing QB data reliably
- Document management storing 10GB per user
- Basic workflows triggering correctly
- Security audit passed (zero critical, <3 high severity findings)
- 2-week production stability achieved (99.5% uptime)

Phase 2 Complete

- Land module tracking all active properties with real-time costs
- Legal Close Land automating closings via DocuSign
- Material Procurement handling 2000+ annual POs
- ADP sync 100% accurate (payroll costs to GL)
- DocuSign handling 500+ envelopes/month peak
- Cross-divisional workflows automated (Land → Legal, → Material)
- Russ + David + Tracy fully operational in system
- Finance able to close books using platform data

Phase 3 Complete

- All 8 divisions operational and profitable within platform
- Field Division mobile app >95% adoption by crew
- Plant module tracking all assets and maintenance
- Leasing module managing rent roll with RealPage sync
- Legal Rollovers meeting 100% of compliance filing deadlines
- Cross-division workflows fully automated, zero manual handoffs
- Russ has complete visibility + ability to drill-down into any data
- All 40 users trained and self-sufficient

Phase 4 Complete

- iOS and Android apps in app stores (combined 200+ downloads)
- Field crew productivity increased 15%+ vs. paper processes
- Executive dashboard replacing 80% of manual reporting
- NLP agent responding to queries with 90%+ accuracy
- Vendor portals live with 50%+ vendor adoption
- All integrations (Compsys, Hello Data, Treasury) syncing daily

Phase 5 Ongoing

- 99.95% uptime SLA maintained
- Document parsing 95%+ accurate
- User satisfaction (NPS) >4.2/5

- Stretch goal: measurable cost reduction per division, baseline established in Phase 1 discovery
 - Platform supporting future expansion to 15+ divisions
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Assumptions & Constraints

Assumptions

1. **Accounting Hub Interview:** Scheduled and completed by end of April 2026
2. **RealPage API:** Confirmation of access and data availability by Q2 2026
3. **QuickBooks Data:** Can be read via QB API; no complex migration needed
4. **Team Availability:** Webaroo team 100% dedicated; no context-switching
5. **Division Cooperation:** Stakeholders provide timely feedback and UAT participation
6. **Budget:** Approved at **\$2.6M–\$3.0M** for 14-month build + Year 1 support, payable on a milestone schedule with \$300K collected upfront for Phase 1. See Budget Estimate for full payment schedule.
7. **Data Quality:** Historical data can be manually entered or imported by divisions

Constraints

- **Timeline:** Aggressive 14-month schedule; no phase compression without resource increase
 - **Mobile Priority:** Field Division requires mobile to be credible; cannot delay past Phase 4
 - **RealPage Dependency:** Leasing module blocked if API unavailable; CSV contingency slow
 - **Data Fragmentation:** No automated way to consolidate data from OneDrive, email, sheets; manual effort required
 - **Change Management:** 8 divisions with zero tech infrastructure; training & adoption risk high
 - **Compliance:** 7-10 year retention + regulatory tracking (OSHA, IPIA, Fair Housing) must be built in from start
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Document Information

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-

This roadmap is a living document. Updates will be published monthly as the project progresses through phases. All milestone dates are targets and subject to resource availability and scope confirmation.

NAVIGATE THE PACKAGE

All Discovery Materials

01 Audit & Competitor Analysis

02 Technical & Project Evaluation

03 Project Charter

04 Project Roadmap & Milestones

05 Risk Analysis & Mitigation

06 Budget Estimate

07 Product Backlog

08 Payment Schedule & Terms
