

Sample Executive Assessment

Property Management Launch Edition

Summit Property Management Group

Representative property management organization

Illustrative representative assessment

This sample is fictional and is intended to demonstrate the format, quality, and executive-level judgment Nā Pali provides during a typical engagement. It is not based on any one organization and should not be interpreted as an audit, attestation, legal opinion, or technical certification.

Independent executive technology judgment before expensive decisions.

Built for leaders who need clarity before they commit.

Launch Edition | v2.0

Property Management Scenario

Multi-site operations, vendor access, tenant service, and technology decisions that protect continuity.

This assessment shows how Nā Pali helps leadership teams move from uncertainty to informed decision-making. It does not attempt to document every technical detail. It surfaces the decisions leadership should make before technology becomes more expensive, more complex, or more difficult to unwind.

Representative Client Profile

- 65 employees
- 140+ properties managed
- Four offices with mobile property managers and maintenance coordinators
- Microsoft 365, AppFolio/Yardi-style property system, accounting platform, tenant portals, vendor portals, mobile devices, and outsourced IT

Initial Business Concerns

- Leadership is unsure whether former employees, contractors, and vendors lose access promptly across all systems.
- MFA is inconsistent across field staff, portals, and third-party vendors.
- Tenant-facing systems and maintenance workflows depend on vendors with unclear recovery expectations.
- Mobile devices and shared files create operational and security risk.
- Technology decisions are often reactive and vendor-led rather than guided by an executive roadmap.

When Nā Pali would be brought in

Before vendor consolidation, portfolio growth, cyber insurance renewal, tenant portal changes, or modernization of maintenance and owner-reporting workflows.

Executive Decision Brief

A concise leadership summary of what matters most, what decisions are needed, and what should happen next.

What We Learned

Summit Property Management Group has reached a point where technology is no longer a background function. It now affects risk, operations, client service, growth, and leadership decision-making. The organization has a workable technology foundation, but several decisions should be made before vendors, staff, or events force those decisions under pressure.

What Leadership Should Decide

1. Who owns technology decisions across offices, systems, vendors, and properties?
2. Which tenant-facing systems must be recoverable first during disruption?
3. Where can standardization reduce risk without slowing property teams?

What Should Happen Next

- Close the highest-risk access and governance gaps first.
- Create a technology roadmap tied to business outcomes rather than vendor recommendations.
- Establish a quarterly leadership rhythm for technology risk, vendors, investments, and progress.

Nā Pali point of view

Most technology failures begin long before the outage. They begin when leadership commits to decisions without enough independent judgment.

Technology Confidence Snapshot

The snapshot is not a technical grade. It is an executive view of where leadership has confidence, where uncertainty remains, and where decisions should be made next.

Domain	Confidence	Executive Interpretation
Protect	Limited	Identity, vendor access, and mobile access need stronger control.
Stabilize	Moderate	Core operations function, but recovery planning is not fully validated.
Optimize	Moderate	Workflow improvements could reduce rework and vendor friction.
Govern	Limited	Technology decisions need clearer ownership and executive oversight.
Grow	Moderate	Technology can support portfolio growth if standardized intentionally.

Confidence Areas

- Leadership understands that tenant and owner service depends on reliable systems.
- The organization has clear operational processes that can be strengthened with better governance.
- There is an opportunity to reduce risk without disrupting daily property operations.

Priority Risks Leadership Should Not Ignore

These risks are not listed to create alarm. They are listed because they are decision points. Each represents an area where leadership can reduce uncertainty before it becomes more expensive.

Vendor access risk

Maintenance providers, contractors, and former employees may retain access longer than intended.

Tenant service continuity risk

Portal, payment, communication, and maintenance systems may not have clearly tested recovery paths.

Mobile workforce risk

Property managers and field staff depend on mobile access, shared files, and third-party applications with inconsistent controls.

The Decision Behind the Risk

The question is not whether every risk can be eliminated. It cannot. The question is whether leadership understands which risks it is accepting, which risks it is reducing, and which risks it is unintentionally ignoring.

Technology Judgment Framework

Nā Pali evaluates technology decisions through five business lenses. The purpose is not to make leadership more technical. The purpose is to give leadership enough independent judgment to make the next decision well.

Lens	Leadership Question
Risk	What risk does this decision reduce, transfer, or create?
Resilience	Will the organization be more able to recover, adapt, and continue operating?
Operations	Will this simplify the work or add complexity people will struggle to manage?
Governance	Who will own the decision after the contract is signed?
Value	What business outcome justifies the investment?

Applied to This Assessment

- Risk: reduce exposure created by unclear access ownership and vendor dependencies.
- Resilience: clarify which systems must recover first and what recovery expectations are realistic.
- Operations: simplify workflows and reduce tool sprawl where possible.
- Governance: define who owns technology decisions after vendors make recommendations.
- Value: align investments with business outcomes leadership can explain and defend.

Executive Recommendations

The recommendations below are intentionally sequenced. The goal is not to do everything at once. The goal is to protect the next major decisions by reducing the uncertainty around them.

1. Close access and identity gaps first

Access risk is one of the fastest places to reduce exposure without disrupting the business. Leadership should know who has access, why they have it, and how quickly access can be removed.

2. Clarify resilience before the next disruption

Recovery assumptions should be tested before the organization needs them. Leadership should know which systems matter most and what continuity really requires.

3. Replace reactive technology decisions with a roadmap

Vendor recommendations should support leadership priorities, not define them. The roadmap should make investment decisions visible, sequenced, and defensible.

4. Govern AI before adoption becomes informal

AI can create value, but only if confidential data, approved tools, and acceptable use are clearly understood.

5. Establish quarterly executive technology reviews

Technology decisions should have a rhythm. Quarterly reviews create accountability without overwhelming leadership with technical detail.

DELIVERABLE 2

Executive Technology Roadmap

A roadmap should not be a long project list. It should help leadership decide what matters now, what can wait, and what should be sequenced deliberately.

Now: 0-90 Days	Next: 3-6 Months	Later: 6-12 Months
<ul style="list-style-type: none">• Review access for employees, former employees, vendors, and contractors across all critical systems.• Expand MFA coverage for field staff, portals, and administrative users.• Document recovery expectations for tenant portal, payments, maintenance, and owner reporting.	<ul style="list-style-type: none">• Create a vendor governance model for IT, property systems, payment systems, and maintenance workflows.• Develop a technology roadmap aligned to portfolio growth and operational efficiency.• Standardize mobile device and shared file practices.	<ul style="list-style-type: none">• Build quarterly technology and vendor review cadence.• Evaluate AI use cases for tenant communications and back-office productivity.• Create executive reporting for risk, service continuity, and modernization progress.

Roadmap principle

The roadmap should protect leadership from making disconnected technology decisions. Every initiative should connect to risk, resilience, operations, governance, or measurable value.

Executive Readout

The readout is designed as a leadership conversation, not a technical lecture. The goal is for decision makers to leave with fewer unanswered questions and a clearer view of what to do next.

Suggested Readout Flow

4. What leadership wanted to understand
5. What Nā Pali observed
6. Where the organization has confidence
7. Where hidden risk remains
8. What decisions should be made next
9. What the roadmap recommends
10. Where Nā Pali can continue to provide independent judgment

Questions for Leadership

- Who owns technology decisions across offices, systems, vendors, and properties?
- Which tenant-facing systems must be recoverable first during disruption?
- Where can standardization reduce risk without slowing property teams?
- Which recommendation would create the most confidence within the next 90 days?
- Where do we need vendor input, and where do we need independent judgment before vendor input?

From Assessment to Better Decisions

An assessment is useful only if it improves what leadership does next. After reviewing the findings, organizations typically choose one of three paths.

Implement Internally

Use the report and roadmap to guide internal leaders, IT teams, and vendors.

Engage Nā Pali for Strategic Advisory

Bring independent judgment into a specific decision, vendor evaluation, roadmap, AI initiative, or risk review.

Engage Nā Pali as Fractional CIO

Establish an ongoing executive technology leadership rhythm for quarterly reviews, vendor oversight, roadmap execution, and board-ready decision support.

What This Sample Demonstrates

This sample shows how Nā Pali would translate the technology realities of a representative property management organization into business decisions leadership can understand, prioritize, and act on.

Wonder what your next technology decision should look like?

You do not have to become a technology expert. You need enough independent judgment to make the next decision well.

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This document is illustrative and should be used to understand the format, quality, and decision-oriented approach of Nā Pali client deliverables.