

# Sunrise AI Implementation Roadmap – Goal-Grouped

**Prepared by:** Carlos Terrazas (Director of People & Technology) · with Aurora **For:** AI Weekly Meeting — Brian Spear, Ron Agaylan **Date:** 2026-05-18 **Lineage:** Execution companion to the refreshed **Strategic Blueprint for AI-Enhanced Execution V2.1** (sent alongside this document), which preserves the original V2 (Nov 2025) six-pillar structure with financial targets refreshed to the current 2026 goals. Operationalized from `AI_IMPLEMENTATION_ROADMAP.md v1.0` (2025-11-23). Same Six Pillars, regrouped from Pillar axis → Goal axis for execution tracking. The Blueprint (V2.1) defines *strategic intent*; this reports *what has shipped against it*.

## §0 – Frame: this roadmap has been running since November 23, 2025

This is **v2.0** of a roadmap first written **2025-11-23** with a weekly check-in cadence and escalation path built in. It is not a new document started for this meeting. What it tracks has been shipping:

Committed in the Nov 2025 roadmap	Status today
Q4 Rock — AI Governance, AUP, Training	✅ <b>Complete.</b> AUP COO-validated FULLY COMPLIANT 2025-11-26; 6 prohibited uses; companywide training rolled out. <i>(A refreshed, expanded AUP is now in leadership review.)</i>
Monthly portfolio reporting automation	✅ <b>Production.</b> KPI dashboard live, 30+ KPIs from RentManager, 4 hrs → 30 min
RentManager data integration	✅ <b>Production.</b> MCP server + canonical calculation layer
Predictive delinquency	✅ <b>Production.</b> All current tenants scored monthly, economic-state integrated
Acquisitions evaluation tooling	✅ <b>Live.</b> IC deal pipeline dashboard, Excel extraction, Buy Box scoring, Operations Value Model. <i>(The unified AcquisitionsOS build that consolidates these is in progress — §1.)</i>
AI knowledge base / staff support	✅ <b>Live (internal).</b> Sunny AI for staff; Sentinel always-on agent

### What changed in v2.0 — and why it matters for this meeting:

The Blueprint and the Nov roadmap were organized by *what AI does* (the Six Pillars, each tied to a financial target). This version adds an execution axis: grouping by **goal** — the end-state each project serves. A goal retires when achieved; its projects drop to maintenance. Every project points to a named end-state with an owner. The goal registry is maintained in-repo ( `GOALS.md` ); each project's chain file declares its goal, so this grouping is generated from source. The Pillar axis is preserved — §0.5 is the Pillar-to-execution crosswalk.

## §0.5 — Blueprint Execution Scorecard: 6 Pillars → What Shipped

*Execution status of each of the Six Pillars defined in Blueprint V2.1. The original V2 financial targets (\$125M acq / 5% NOI / \$88M capital) were superseded at the April 14, 2026 townhall; V2.1 carries the current 2026 goals, summarized below. This scorecard names what has shipped and what remains a gap.*

Blueprint Pillar	Blueprint's named AI applications	Goal axis	Execution status
<b>P1 Acquisitions &amp; Growth</b>	Predictive Deal Sourcing · Automated Underwriting Assistant · Enhanced Market Analysis	AcquisitionsOS live	✅ <b>Strong.</b> UW assistant (Ops Value Model v1.3, acquisition-auditor agent, Buy Box scoring) shipped; market analysis live; predictive sourcing partial (OSINT live, automation planned)
<b>P2 Asset Mgmt &amp; Financial Perf.</b>	Delinquency Risk Forecasting · Predictive Maintenance & CapEx · Dynamic Utility Auditing	Asset Mgmt OS / Ops OS / Finance OS	🟢 <b>Mixed.</b> Delinquency forecasting ✅ production (all tenants); utility-anomaly detection partial (RM Expense Audit caught a six-figure utility-billing anomaly at one property); predictive maintenance = open gap (capex-comparison on-hold)
<b>P3 Property Ops &amp; Resident Exp.</b>	24/7 Resident Bot · Sentiment Analysis · Automated Work-Order Triage · AI Inspections	Ops OS	🟡 <b>Deliberate gap.</b> Sunny AI built but <b>internal-only by a conscious Fair Housing decision</b> — resident-facing deferred, not failed. Sentiment/triage/inspections = unbuilt. This is the honest “not yet” pillar
<b>P4 People &amp; Culture</b>	Candidate Profile Matching · AI Training & Development · Manager Performance Insights	PeopleOS	🟢 <b>In flight.</b> Training & Development = Q2 Rock 1 ( training.suncom.work ); manager insights partial (property-performance); candidate matching = pitched, unbuilt
<b>P5 Systems, Technology &amp; Data (sOS)</b>	“Aurora Hub” Knowledge Base · Automated Scorecard Generation · Anomaly Detection	Ops OS / Aurora Improvement / Sentinel	🟢 <b>Largely shipped.</b> Scorecard automation shipped (KPI dashboard, 4hr→30min); anomaly detection live (Sentinel monitors + RM audit); knowledge base partial — Sunny (internal-only), enterprise Wiki planned
<b>P6 Investor Relations &amp; Capital</b>	AI Content Syndication & Lead Gen · Intelligent Lead Qualification · AI Investor Comms · Data-Rich Investor Portal	IR-OS	🟢 <b>In flight.</b> Content syndication (Sage_Brand) + lead qual + investor comms (IR_Intelligence_Layer) active; data-rich portal = open gap (IR Capital Flywheel v0.3 pending)

Every Pillar in the Blueprint has shipped or in-flight execution. The two biggest executive-level gaps — resident-facing P3 and the investor portal (P6) — are named explicitly; the P3 gap is a deliberate Fair-Housing risk decision, not a miss (see the Pillar 3 governance note in the Blueprint). Smaller per-application gaps (predictive maintenance, sentiment, triage, inspections, candidate matching, Credit Fund substrate) are marked in the table above and the §0.6 status column.

## §0.6 — Alignment to Current 2026 Company Goals (post-April-14 townhall)

Source: Knowledge Base/COMPANY\_STATE.md, last source event Q1 2026 townhall (Brian presenting, April 14). 2026 targets: AUM \$500M · NOI \$22M · Revenue \$37M. Portfolio: 45 MHCs, 8,250+ lots, \$330M parking AUM. Q1 actuals: Rev \$8.57M (+14.5%), NOI \$5.59M (+11.3%), margin 65.2% (-190bps — costs outpacing revenue).

2026 Company Goal (official order)	Goal-axis portfolio serving it	Status
<b>1. Companywide Value Engines Mapped</b>	Playbook Library (Value Engine process maps + SOPs) → Sunrise Machine — the systems / single-source-of-truth play (Pillar 5)	● Active — direct line to the #1 company goal
<b>2. 6% Same-Store NOI Growth (MHCs)</b>	KPI dashboard, delinquency model, property-performance, Expense Analysis, RM audit	✓ Production analytics stack supporting the NOI goal
<b>3. Launch Credit Fund</b>	loan-candidate-screening (autoMHatic referrals) adjacent; <b>no dedicated AI substrate yet — flagged gap</b>	● Open — candidate net-new workstream
<b>4. \$100M New Acquisitions</b>	AcquisitionsOS, IC Deal Tracker, Ops Value Model, Buy Box, Market/OSINT	● Full evaluation stack live (Q1 attainment 12.8%)
<b>5. \$75M Capital Raised</b>	Sage_Brand, IR_Intelligence_Layer, Investor Reports, Investor Briefs	● IR funnel substrate in flight (Fund 5 >\$28M Q1)

With Q1 NOI margin down 190bps (costs outpacing revenue), the expense-control substrate (RM Expense Audit, delinquency model, Expense Analysis) is the AI work most directly relevant to Goal #2 (6% same-store NOI growth).

Sourcing: §0.5 maps the Blueprint's Six Pillars to current execution status. §0.6 goals and targets are from COMPANY\_STATE.md (canonical company-state record, Q1 2026 townhall, April 14). Status reflects current substrate, not Blueprint timeline adherence.

## §1 — The Portfolio, Grouped by Goal

Nine active goals. Each is an end-state, not a department. Status legend: ✓ shipped/production · ● active · ● planned/in-design · || on-hold/parked.

### Goal: AcquisitionsOS live

End-state: full acquisitions one-stop-shop, lead-gen → qualification → underwriting → IC, no manual re-keying.

- **IC Deal Tracker** ( `acquisitionsic.suncom.work` ) — live deal pipeline, financial views, heat map, IRR/EM/yield, used by Kevin & Kirk
- **Operations Value Model v1.3** — seller T-12 → Sunrise-managed P&L projections, state-specific
- **AcquisitionsOS** — the one-stop-shop build (CF Pages+D1+Workers); **March 6 design is 8-auditor-reviewed and build-approved on the Sunrise stack**
- **Market Research / OSINT** — Maryland pipeline (80+ parks), deal-flow automation
- **market-rent-tracker** — automated lot-rent comp OSINT

### Goal: Asset Management OS

*End-state: asset performance + compliance + portfolio analytics connected (Sam's domain).*

- **Enterprise Meeting Knowledge Base** (Transcripts Plan) — **directly answers Ron agenda items 1 & 3**; Q2 Rock, Carlos technical lead, June 30 leadership pilot
- **Playbook Library** — Value Engine process maps + SOP playbooks
- **property-performance / tenant-churn / Expense Analysis** — cross-portfolio comparison, retention, card audits
- **scanned-mail-automation** — daily OCR/categorize/route, Phil human-gate (Phase 2 built, 132 tests)
- **Parking financials** (~\$4.0M NOI) ·  **software-optimization** (66-vendor consolidation, \$15–25K/yr)
- **property-pulse** — real-time property-health KPIs

### Goal: Ops OS

*End-state: daily operations connected and Sentinel-orchestrated, minimal manual triggers.*

- **Sunny AI** ( `sunny-cm.suncom.work` ) — internal staff assistant (RAG + CM chat); internal-only, not resident-deployed
- **tickets** ( `tickets.suncom.work` ) — status-email + auto-close shipped
- **delinquency-risk-model** ·  **loan-candidate-screening** — monthly/quarterly production
- **Google + Dropbox MCP servers** — Workspace/Slack integration (25 tools)
- **data-pipeline-consolidation** — 2025 P&L integrity fix + validation framework
- **weekly-digest** — Sunday transcript digest (persistent-memory phase 1)

### Goal: Sentinel

*End-state: always-on autonomous agent working 24/7 (observe → propose → approve → execute).*

- **Sentinel** — always-on Mac Mini agent (scheduled LaunchAgents + Slack bot)
- **sentinel-dashboard** ( `sentinel.suncom.work` ) — task/health view
- **Sentinel MCP Host Architecture** — **Linux/Cloud-Run host to remove the single-machine dependency** (directly relevant to Ron items 7 & 8 — this is the de-risking path, already scoped)
- **Sentinel v3** — night-shift autonomy · **Autonomous Agent System** — multi-session orchestration

### Goal: PeopleOS

*End-state: People/HR/AI-literacy systematized; org on Claude Team plan.*

- **AI Governance & Training** — AUP COO-validated, role-specific manuals, ethical checklist; refreshed version in leadership review (**answers Ron item 11**)

- ● **training.suncom.work** — Q2 Rock 1, due 2026-06-30; role tracks + one runbook per production tool (answers Ron item 13)
- ● **paychex-api** — payroll integration engine (~4 hrs/mo saved)
- ● **Claude Team migration + prompt stack** — org/user/project prompt architecture, RM MCP exposed to Team
- ● **Predictive Index** (Carlos inherited admin 2026-04-30) · ● **AI Hiring Workflow**

### Goal: IR-OS

*End-state: investor reporting + raise pipeline + Sage content connected end-to-end.*

- ● **Sage\_Brand** — podcast/content system (CF Workers+D1), Eric Q2 Rock clip extraction
- ● **IR\_Intelligence\_Layer** — HubSpot IR intelligence + Sage integration
- ✓ **Investor Reports** — quarterly Fund I/II reports (config→JSON→Word)
- ● **Investor Intelligence Briefs** — investor OSINT + playbooks

### Goal: Finance OS

*End-state: monthly close, AP, bank rec, cash requirements running connected.*

- || **AP Process** — AP automation ( `ap.suncom.work` ), **CFO-frozen** (Mike's call, not a tech blocker)
- ✓ **Paychex Cash Requirements** — payroll cash estimator from PDFs
- || **bank-reconciliation-automation** — eval concluded RM native Bank Sync is the answer

### Goal: Aurora Improvement

*End-state: Aurora is a top-tier AI partner (process, tooling, substrate, agent ecosystem).*

- ✓ **21-agent panel + 8-auditor QA protocol** — internal + external CLI models, mandatory on IC memos / production code / leadership materials (answers Ron item 6)
- ● **Aurora-Improvements** — WIF auth migration, agent-ecosystem, deploy plans (**WIF = a direct Ron item 7 security answer**)
- ● **ensemble** — multi-agent collab engine · ● **Security Scripts Overhaul** (v1.0.2 shipped)
- ● **Dream v2 · ai-maestro · Agent Tools Hardening · Knowledge Wiki** — substrate hardening backlog

### Goal: Sunrise Machine

*End-state: unified 6-layer operational intelligence platform (Q2 Rock candidate — scope under Carlos review).*

- ● **Sunrise Machine** — spans every workflow chain; the eventual integration layer over all of the above

**rentmanager-mcp** is deliberately ungrouped — it's a cross-cutting data utility feeding Monthly-Close, New-Deal, Investor-Pipeline, and Daily-Ops. Listing it under one goal would misrepresent it.

## §2 — Ron's 14-Item Agenda → Substrate Crosswalk

**The headline: ~11 of 14 agenda items already have a shipped or in-flight answer.** Three items (4, 10, and the forward half of 7/8) are genuinely net-new — the enterprise data-infrastructure layer. That's §3.

#	Ron's agenda item	Status	Where it already lives / owner
1	Meeting Knowledge Base Review	🟢 <b>In flight</b>	Transcripts Plan — Q2 Rock, Carlos technical lead, June 30 pilot
2	Enterprise AI Vision & Long-Term Direction	✅ <b>Exists</b>	This roadmap — running since Nov 23, 2025; v2.0 today
3	Historical Meeting Transcript Strategy	🟢 <b>Scoped</b>	Transcripts Plan Phase 2 (historical dept meetings)
4	<b>Enterprise Data Organization Plan</b>	🟡 <b>NET-NEW</b>	<b>Carlos owns the v1 — see §3</b> (foundation: data-pipeline-consolidation done, DATA_DICTIONARY.md)
5	Google Drive Migration & File Architecture	🟢 <b>Memo drafted</b>	Dropbox→Drive migration (6→7TB/18-user, \$9.1K savings); handed off 2026-05-16
6	AI Agent Infrastructure Roadmap	✅ <b>Live</b>	21-agent panel + 8-auditor protocol + Sentinel; ai-maestro tracks L1→L4 autonomy
7	Enterprise AI Security & Risk Discussion	🟡 <b>Partly shipped</b>	AUP COO-validated; WIF auth migration in flight; Security Scripts v1.0.2 — + <b>net-new governance layer in §3</b>
8	Local Server vs Cloud Strategy	🟡 <b>Scoped</b>	Proposed split: pause net-new local infra; managed-migrate running production services (not a freeze). Sentinel→Cloud-Run host architecture already scoped
9	Email Archive & AI Integration Strategy	🟢 <b>Partial</b>	gmail-cleanup done; Google MCP (Gmail) live; archive strategy = part of §3 data layer
10	<b>Enterprise Architecture Framework</b>	🟡 <b>NET-NEW</b>	<b>Carlos owns the v1 — see §3</b> (CF stack + Mini + MCP topology to be documented formally)

#	Ron's agenda item	Status	Where it already lives / owner
11	Approved AI Tools & Governance	✅ <b>Shipped; refresh in review</b>	AUP — 6 prohibited uses, C.O.D.E. sanitization, COO-validated; refreshed, expanded version in leadership review; Claude Team governance next
12	Weekly AI Meeting Structure & Cadence	✅ <b>Pre-proposed</b>	Nov 2025 roadmap already specified weekly check-ins + escalation path — this isn't new direction
13	Change Management & AI Adoption Across Depts	🟢 <b>Rock-anchored</b>	Q2 Rock 1 (training site) + Rock 2 (5 named owners unassisted); Ron owns change-mgmt per Apr 17 duty transfer
14	AI Quarterly Rocks Alignment	✅ <b>Mapped</b>	Q2 Rock 1 + Rock 2 (Carlos); Meeting KB (Ron's Leadership Rock); all in §1 goals

### §3 — The Net-New Layer: Enterprise Data Infrastructure (Carlos owns the v1)

Everything in §1 is the **application layer** — what AI *does*. Ron's agenda correctly surfaces a layer *underneath* it that has not been formally designed: **where enterprise data lives, who owns it, how it's accessed and governed**. This is genuinely net-new and genuinely the right next chapter.

**Carlos's commitment for next week's meeting:** a v1 of the Enterprise Data Infrastructure plan covering:

1. **Data domains & ownership** — investor data, resident/PII (SSNs), financial, operational, meeting transcripts, email archive — each with a named owner and a sensitivity tier
2. **Where it lives** — current-state map (CF D1/R2/KV, Google Workspace, Dropbox, Mac Mini, RentManager) → target-state
3. **Access control & governance** — extends the COO-validated AUP from *tool use* to *data access*; ties to the Claude Team prompt-stack rollout
4. **The local-vs-cloud + key-man resolution** (Ron items 7 & 8):
  - **Pause:** no net-new local/private infrastructure until this plan is reviewed — agreed without reservation
  - **Migrate, don't freeze:** running production services (KPI dashboard, deal extraction, daily ops automation, Sentinel) move to managed cloud on a scheduled path — the **WIF auth migration** (already planned, kills static-key risk) and the **Sentinel→Cloud-Run host architecture** (already scoped) are the vehicles; they exist, they just need to be sequenced and resourced
  - **Distributed-ownership de-risk:** Q2 Rock 1 runbooks (one per production tool) + Rock 2 (5 named owners running unassisted 30+ days) directly retire single-operator risk by June 30 — this is already a committed Rock with a deadline, not a new promise
5. **Brian's P1→P5 phasing, mapped to existing substrate** (so this builds on rails, doesn't start from zero):

Brian's phase	Already exists	Gap to design
P1 — Meeting transcripts	Transcripts Plan in flight (Q2 Rock)	Retention + access policy
P2 — Historical dept meetings	Transcripts Plan Phase 2 scoped	Backfill scope + storage tier
P3 — Dropbox/Drive files	Migration memo drafted	File architecture + permissions model
P4 — Historical email	gmail-cleanup done; Gmail MCP live	Archive strategy + retention
P5 — AI agents on those pools	21-agent panel + Sentinel running	Governed access to the new data layer

## §4 — Cadence

The Nov 2025 roadmap already proposed weekly check-ins during critical execution + an escalation path. Ron's agenda item 12 formalizes it. Proposed standing structure for the AI Weekly:

1. **Portfolio state** — what shipped / moved since last week (by goal, §1)
2. **Net-new layer progress** — enterprise data infrastructure plan (the v1, then iterations)
3. **Decisions needed** — anything blocked on Brian/Ron
4. **Cross-track signal** — external inputs (consultant recs, new tools) triaged: implement / adopt-principle / decline
5. **Rocks alignment** — Q2 Rock 1 + 2 status against June 30

**Owned for next week:** Carlos delivers the Enterprise Data Infrastructure plan v1 (§3). That is the architect-seat deliverable — proof that the right person owns the right gap.

*Lineage: AI Implementation/🚀 AI\_IMPLEMENTATION\_ROADMAP.md v1.0 (2025-11-23) · GOALS.md canonical registry · 7 chain manifests (\*/CHAIN.md) · Track A substrate inventory (2026-05-13). All project statuses traceable to chain source files; no figures fabricated.*