

PLAYBOOK_AI_MATRIX

Sunrise Machine — Playbook ↔ AI Tool Mapping Matrix

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Purpose: Map every Value Engine, Playbook, and business workflow to the AI skills, agents, scripts, projects, and dashboards that enhance them. This IS the missing presentation layer of the Sunrise Machine.

Source Data: 17 Value Engines, 65+ Playbooks, 25 Skills, 21 Agents, 23 Workflow Map Workflows, 64 Projects, 10+ Production Scripts, 6 Dashboards, 15 LaunchAgents

How to Read This Matrix

Each section maps a **Value Engine** (the process map) to:

- **Playbooks** — the documented SOPs under that engine
- **AI Tools** — skills, agents, scripts, and dashboards that touch those workflows
- **Automation Level** — where we are today (Manual → Detected → Guided → Automated)
- **Workflow Map Ref** — cross-reference to `WORKFLOW_MAP.md` (A1-A6, O1-O5, F1-F5, C1-C3, S1-S4)
- **Projects** — active/completed projects that built or enhance these tools
- **Gaps** — what's missing or disconnected

Automation Levels:

| Level | Meaning |

|-----|-----|

| **Automated** | Runs end-to-end without human trigger (Sentinel, cron, webhook) |

| **Semi-Automated** | Skill/script exists, needs manual trigger |

| **Guided** | Agent provides drafts/analysis, human reviews and decides |

| **Detected** | System detects the trigger (e.g., daily briefing finds form entry) but doesn't act |

| **Manual** | Tools exist but are invoked ad hoc, not connected to workflow |

| **None** | No AI tooling touches this workflow |

PART 1: DOCUMENTED VALUE ENGINES (17 Process Maps + 65 Playbooks)

Department: Acquisitions (01)

Value Engine: Acquisitions

#	Playbook	AI Tools	Level	Notes
1	Prequalify Lead	osint-investigator agent, perplexity-contact-verifier agent, mhp-property-scout agent, property-ownership-investigator agent, contact-information-researcher agent	Manual	5 agents exist but run standalone. Not triggered by incoming broker emails.
2	Create Deal in Monday.com	None	None	Monday.com API could automate workspace creation. See Improvement #4.
3	Review Underwriting	mhp-acquisitions-expert skill, market-rent-analyst agent, market-intelligence-analyst agent, portfolio-performance-analyst agent	Manual	Skill exists for scoring deals. Agents provide market data. Not chained.
4	Conduct Due Diligence	mhp-acquisitions-expert skill, capital-projects-analyst agent, financial-auditor agent, risk-assessment-strategist agent, compliance-monitor agent	Manual	Full DD agent roster exists (A3 workflow). Each invoked separately.
5	Conduct Financing Lender Kick-Off	entity-formation skill	Manual	Overlaps with Entity/OPAG playbooks (consolidation needed per Improvement #2).
6	Execute Purchase Sales Agreement	compliance-monitor agent	Manual	Legal review gate missing from playbook.
7	Create New Entity Within A State	entity-formation skill	Semi-Automated	Skill has full checklist + BOI/CTA steps.
8	Create Operating Agreement	compliance-monitor agent	Manual	"Send to ???" still in playbook. Legal review gate missing.
9	New Entity Bank Account Setup at Truist	None	None	100% placeholder playbook. Procedure exists inside Lender Kick-Off.

#	Playbook	AI Tools	Level	Notes
10	Execute Closing	financial-auditor agent	Manual	Wire transfer playbook has no dual-control. Critical gap.
11	Implement Post Closing Hand-Off	eos-scorecard-analyst agent, capital-projects-analyst agent, portfolio-performance-analyst agent, compliance-monitor agent, hr-operations-specialist agent	Manual	A6 workflow maps 8 tools but none are connected. Split into 4 per Improvement #6.

Projects Feeding This Engine:

| Project | Status | Impact |

|-----|-----|-----|

| Deal Flow Automation | Planned | Would chain A1→A2 automatically (broker email → deal score) |

| IC Deal Tracker Dashboard | Complete | Tracks deals through pipeline at

acquisitionsic.suncom.work |

| Maryland MHP Acquisition Pipeline | Complete | Proved the OSINT agent chain works for deal sourcing |

| Operations Value Model | On Hold | v1.2 scoring model, dormant 49 days |

| 2026 Acquisitions Dashboard | Planned | Pipeline visibility for team |

Key Gaps:

1. **No orchestration** — A1→A6 is 6 workflows with 12+ agents, all invoked manually
2. **Deal Flow Automation** would connect broker email parsing → scoring → team alert (saves \$9,900/yr)
3. Wire transfer dual-control is a CRITICAL audit finding with no AI guardrail
4. Post-closing hand-off is one massive playbook that should be 4 (Improvement #6)

Value Engine: Due Diligence CAPEX

Process Map: 01 Value Engines/Due Diligence CAPEX.pdf

Workflow Map: A3 (Deep Dive substep)

#	Playbook	AI Tools	Level	Notes
1	Conduct Due Diligence (CAPEX section)	capital-projects-analyst agent, mhp-operations-expert skill	Manual	Agent can prioritize CapEx, estimate ROI. Not connected to DD workflow.

Projects: CapEx & WIP Budget Comparison (On Hold — blocked on RM Job# tagging)

Key Gap: CapEx assessment during DD is disconnected from ongoing CapEx tracking post-acquisition.

Value Engine: Deal Closing (Acquisitions side)

Process Map: 01 Value Engines/Deal Closing.pdf

Workflow Map: A5

#	Playbook	AI Tools	Level	Notes
1	(Covered under Acquisitions VE above — Execute Closing, Entity Formation)	See Acquisitions table	—	—

Department: Investor Relations (02)

Value Engine: Lead Qualification

Process Map: 01 Value Engines/Lead Qualification.pdf

Workflow Map: Not directly mapped (IR-specific)

#	Playbook	AI Tools	Level	Notes
1	Call Lead	hubspot-expert skill	None	No AI assists the call itself. TCPA compliance missing.
2	Offer Discovery Call	hubspot-expert skill	None	CRM field updates could be automated (Improvement #1).
3	Book Discovery Call	hubspot-expert skill	None	Scheduling step, no AI enhancement.
4	Conduct Intro Call	hubspot-expert skill, gemini-research-specialist agent	Manual	IR Intelligence Layer would provide pre-call briefs. Not connected yet.

Projects Feeding This Engine:

| Project | Status | Impact |

|-----|-----|-----|

| IR Intelligence Layer | Active | Pre-call briefs, post-call insights, coaching analytics |

| HubSpot Lead Scoring | Planned | AI-powered investor prospect scoring |

Key Gaps:

1. **TCPA compliance** not in any playbook (CRITICAL audit finding)
2. HubSpot workflow audit (Improvement #1) would eliminate 10-15 manual field updates per call

3. IR Intelligence Layer would transform this from manual CRM work to AI-briefed calls

Value Engine: Deal Closing (IR/Investor side)

Process Map: 01 Value Engines/Deal Closing.pdf

Workflow Map: Not directly mapped

#	Playbook	AI Tools	Level	Notes
1	Book Decision Call	hubspot-expert skill	None	Scheduling, no AI.
2	Conduct Decision Call	hubspot-expert skill, board-reporting-synthesizer agent	Manual	Agent could prep deal summary. Not connected.
3	Conduct Discovery Call	hubspot-expert skill, gemini-research-specialist agent	Manual	IR Intelligence Layer target.
4	Verify Investment Requirements Are Complete	compliance-monitor agent, pm-accounting-expert skill	Manual	506(c) accreditation verification — CRITICAL compliance gap in playbook.

Key Gap: Accreditation verification playbook has existential fund risk (audit finding #1). compliance-monitor agent should be mandatory gate.

Value Engine: Investor Onboarding and Regular Check-ins

Process Map: 01 Value Engines/Investor Onboarding and Regular Check-ins.pdf

Workflow Map: Not directly mapped

#	Playbook	AI Tools	Level	Notes
1	Execute Onboarding Call	hubspot-expert skill, board-reporting-synthesizer agent	Manual	Agent could generate welcome package. Not connected.
2	Conduct Quarterly Check-ins	hubspot-expert skill, eos-scorecard-analyst agent	Manual	Could be automated with HubSpot sequences (Improvement #3).

Projects: IR Intelligence Layer (Active)

Key Gap: Quarterly cadence is fully manual. Improvement #3 would auto-trigger 3/6/9/12-month touchpoints. Est. 48-72 hrs/yr saved.

Value Engine: New Investment Setup

Process Map: 01 Value Engines/New Investment Setup.pdf

Workflow Map: Not directly mapped

#	Playbook	AI Tools	Level	Notes
1	Verify Accreditation	compliance-monitor agent, pm-accounting-expert skill	Manual	CRITICAL: Self-accreditation listed as valid option. Must fix before go-live.
2	Verify the Documents	compliance-monitor agent	None	Document verification is manual.
3	Receive Funds, Update Records, Notify Stakeholders	financial-auditor agent, pm-accounting-expert skill	None	No automation. Fund accounting agent could reconcile.

Key Gap: This entire Value Engine has minimal AI coverage despite high compliance risk. The compliance-monitor agent SHOULD be a mandatory gate on Step 1.

Value Engine: Waterfall Distribution

Process Map: 01 Value Engines/Waterfall Distribution.pdf

Workflow Map: Not directly mapped (finance domain)

#	Playbook	AI Tools	Level	Notes
1	Run Distribution in IMS	pm-accounting-expert skill	None	InvestNext/IMS — no API integration.
2	Approve Distribution and Download NACHA File	financial-auditor agent, compliance-monitor agent	None	CRITICAL: No dual-approval, NACHA sent via Slack unencrypted.
3	Notify Investors	resident-communication-specialist agent (investor variant)	None	Notification is manual.
4	Notify Investors (DUPLICATE)	—	—	Empty shell, should be deleted.

Key Gaps:

1. NACHA file handling has CRITICAL financial controls gap
2. Consolidate 4 playbooks → 1 (Improvement #7)
3. Zero AI tooling on a high-stakes financial process

Value Engine: Podcast Guesting

Process Map: 01 Value Engines/Podcast Guesting.pdf

Workflow Map: Not directly mapped

#	Playbook	AI Tools	Level	Notes
1	Execute Research	gemini-research-specialist agent, hubspot-expert skill	Manual	Agent could auto-research podcast hosts. Not connected.
2	Gather Assets and Prepare Episode	board-reporting-synthesizer agent	None	Asset preparation is manual.
3	Execute Post-Interview Follow-up	hubspot-expert skill	None	CRM updates manual.

Projects: Sage Brand AI System (Active — Phase 5)

Key Connection: Sage Brand's 8-agent content syndication pipeline IS the AI enhancement for this Value Engine, but it's not connected to the playbooks. Sage Brand takes podcast episodes and generates blogs, social clips, newsletters. The playbooks describe getting ON podcasts; Sage Brand describes what happens with the content AFTER.

Value Engine: Capital Call Down

Process Map: 01 Value Engines/Capital Call Down.pdf

Workflow Map: Not directly mapped

#	Playbook	AI Tools	Level	Notes
—	No playbooks documented	pm-accounting-expert skill, financial-auditor agent	None	Process exists but undocumented.

Key Gap: Capital calls involve significant investor money movement with no documented SOP and no AI guardrails.

Value Engine: Fund Launch Support

Process Map: 01 Value Engines/Fund Launch Support.pdf

Workflow Map: Not directly mapped

#	Playbook	AI Tools	Level	Notes
1	Coordinate with Legal & Compliance	compliance-monitor agent	None	High-level stub, not a real procedure.
2	Create Marketing Materials & Content	board-reporting-synthesizer agent, training-content-developer agent	None	No compliance review gate (audit finding #2).
3	Launch Readiness Checklist	compliance-monitor agent	None	Overview, doesn't match title.
4	Prepare Investor Relations Team	training-content-developer agent	None	List format, not a procedure.

Projects: Investor Raise Cost Analysis (Planned)

Key Gap: Fund launch is a high-stakes, low-frequency process with shell playbooks and zero AI integration. Marketing materials need mandatory compliance review gate.

Department: Operations (03)

Value Engine: Home Sales

Process Map: 01 Value Engines/Home Sales.pdf

Workflow Map: Part of O4

#	Playbook	AI Tools	Level	Notes
1	Apply for Community Approval	fair-housing skill, compliance-monitor agent	None	CRITICAL: No written screening criteria. Fair Housing exposure.
2	Conduct Home Showing	fair-housing skill	None	CRITICAL: No steering guardrails.
3	Send Application to Preferred Lender	None	None	Lender handoff, no AI role.

Built Enhancement: Home Sales Pipeline Tracker (Google Sheet) — provides stage-based tracking with Fair Housing compliance columns (Improvement #8).

Key Gaps:

1. Written screening criteria MUST exist before go-live (audit finding #5)
2. Fair Housing skill should be mandatory gate on community approval

3. Lead paint disclosure missing for pre-1978 homes (audit finding #7)

Value Engine: Home Inventory Fulfillment

Process Map: 01 Value Engines/Home Inventory Fulfillment.pdf

Workflow Map: Not directly mapped

#	Playbook	AI Tools	Level	Notes
1	Pre-Sale Home Inspection	mhp-operations-expert skill	None	Inspection checklist, no AI integration.
2	Final Walk-Through and Inspection	mhp-operations-expert skill	None	Walk-through process, no AI.

Key Gap: AI Property Inspection Analyzer (vision AI for inspection videos) is a planned Phase 2 project that would directly enhance these playbooks.

Department: Asset Management (04)

Value Engine: Process Documentation

Process Map: 01 Value Engines/Process Documentation.pdf

Workflow Map: Not directly mapped (meta-process)

#	Playbook	AI Tools	Level	Notes
1	Map Value Engine and Identify Playbooks	automation-architect agent	Manual	This matrix IS the AI enhancement of this playbook.
2	Document Playbook in the Standard Format	training-content-developer agent	Manual	Agent could draft playbooks from process descriptions.
3	Update Value Engine Library, Playbook Planner and HOT Canvas	None	None	Maintenance task, no AI role.

Meta-Connection: This Value Engine describes HOW to document processes. The Process-to-Agent Framework scores those documented processes for AI automation potential. This matrix connects the two.

Department: Leadership / Executive Assistant (05)

Value Engine: Daily Administrative Report/Support

Process Map: 01 Value Engines/Daily Administrative Report.pdf

Workflow Map: Not directly mapped (EA-specific)

#	Playbook	AI Tools	Level	Notes
1	Book Flight and Travel	enterprise-search skill (Gmail search)	None	Could auto-create calendar events from confirmations. See Improvement #9.
2	Manage Big Ass Calendar	None	None	Physical office calendar, no AI role.
3	Manage Executive Calendar and Time	daily-briefing skill (calendar pull)	Detected	Daily briefing shows calendar but doesn't manage it for EAs.
4	Manage Inbox and Communication	enterprise-search skill, daily-briefing skill	Detected	Daily briefing categorizes inbox. Gmail filters could replicate EA categorization.
5	Manage Task in Asana	None	None	Asana not integrated. Company uses mixed Asana/Monday.com/Google Tasks.
6	Support Meeting	enterprise-search skill	None	OtterAI→Asana action items could be automated.

Key Gap: EA workflows have the highest automation potential per hour saved (Improvement #9: 50-75 hrs/yr). Quick wins: Gmail auto-events, inbox filters, OtterAI→task automation. All use existing tools at \$0 cost.

Department: Org-Wide (06)

Value Engine: Hiring

Process Map: 01 Value Engines/Hiring.pdf

Workflow Map: Not directly mapped

#	Playbook	AI Tools	Level	Notes
1	Prepare/Revise Job Description	hr-operations-specialist agent	Manual	Agent can draft JDs. No EEO/ADA language template (audit finding #24).
2	Initiate Candidate Screening	hr-operations-specialist agent	Manual	FCRA compliance missing (audit finding #10). Video rubric bias risk.
3	Conduct First Interview	hr-operations-specialist agent	None	No structured evaluation forms. No prohibited questions list.
4	Conduct Second Interview	hr-operations-specialist agent	None	Same gaps as First Interview.
5	Send Offer Letter	hr-operations-specialist agent	Manual	Agent can draft offer letters.

Key Gaps:

1. FCRA compliance checklist missing (background checks)
2. No structured interview rubrics (bias risk)
3. AI-Powered Recruiting is a Phase 2 Blueprint initiative — not started

Value Engine: Onboarding

Process Map: 01 Value Engines/Onboarding.pdf

Workflow Map: O2 Employee Onboarding

#	Playbook	AI Tools	Level	Notes
1	Customize Onboarding Template	hr-operations-specialist agent	None	CRITICAL: Missing I-9, W-4, benefits, handbook (audit finding #8).
2	Execute New User Setup	it-operations-specialist agent, google-admin-expert skill, paychex-expert skill, ringcentral-expert skill	Detected	Daily briefing detects form entry + creates task. Provisioning is 100% manual.
3	Execute New User Setup (OLD)	—	—	Duplicate, should be archived.
4	Review Progress thru Daily Check-Ins	None	None	No 30-60-90 day structure.

Automation Chain (Current):

Form submitted → Daily Briefing detects → Google Task created → [MANUAL GAP] → 7 systems provisioned one by one

Projects: Paychex API Integration (Active — 17 endpoints built)

Improvement: #5 Replace Spreadsheet with Paychex Self-Service (eliminates SSN exposure)

Key Gaps:

1. SSN in shared spreadsheets (CRITICAL security finding #15)
2. Passwords in shared sheets (HIGH security finding #16)
3. Steps 3-9 in O2 workflow are all manual — guided checklist would track completion
4. No integration between Paychex API and onboarding workflow yet

Value Engine: Offboarding

Process Map: 01 Value Engines/Offboarding.pdf

Workflow Map: O3 Employee Offboarding

#	Playbook	AI Tools	Level	Notes
1	Conduct Exit Interview	hr-operations-specialist agent	None	CRITICAL: Final pay appears conditioned on clearance (audit finding #9).
2	Create Exit Clearance Form, Submit Termination, Update Files	it-operations-specialist agent, google-admin-expert skill, paychex-expert skill	Detected	Daily briefing detects separation form. Deprovisioning is manual.

Automation Chain (Current):

Form submitted → Daily Briefing detects → Google Task created → [MANUAL GAP] → 7 systems deprovisioned one by one

Key Gaps:

1. No COBRA notification (audit finding #12 — \$110/day penalty)
 2. No state-specific final pay deadlines (audit finding #13)
 3. No access revocation timeline (audit finding #22)
 4. Same manual provisioning gap as onboarding but in reverse
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PART 2: UNDOCUMENTED DEPARTMENTS (No Value Engines or Playbooks)

These departments have **zero playbooks** but significant AI tooling. The Sunrise Machine has built tools for workflows that aren't formally documented.

Finance & Accounting — ZERO PLAYBOOKS, HEAVY AI

This is the biggest paradox in the matrix. Finance has the MOST AI tooling and the LEAST documentation.

Workflow	AI Tools	Level	Workflow Map
Monthly KPI Cycle	<code>export_monthly_kpi_dashboard.py</code> , <code>export_occupancy_dashboard.py</code> , <code>calculations.py</code> , <code>validation.py</code> , <code>snapshot.py</code> , <code>portfolio-performance-analyst</code> agent, <code>/run-monthly-workflow</code> command, <code>/deploy-pages</code> command	Semi-Automated	F1
Monthly Expense Audit	<code>divvy-expense-audit</code> skill, <code>/rm-expense-audit</code> command, <code>financial-auditor</code> agent	Manual	F2
Monthly Financial Close	<code>financial-auditor</code> agent, <code>finance-operations-expert</code> skill, <code>rm-accounting-expert</code> skill	Manual	F3
Quarterly Actuals Review	<code>/run-quarterly-actuals</code> command, <code>economic-forecast</code> skill, <code>export_forecast_dashboard.py</code> , <code>portfolio-performance-analyst</code> agent	Semi-Automated	F4
Annual Budget & Rent Planning	<code>portfolio-performance-analyst</code> agent, <code>market-intelligence-analyst</code> agent, <code>market-rent-analyst</code> agent, <code>fair-housing</code> skill, <code>capital-projects-analyst</code> agent, <code>resident-communications</code> skill	Manual	F5
Delinquency Risk Scoring	<code>delinquency_risk_model.py</code> , <code>delinquency-model</code> skill	Semi-Automated	—
Loan Candidate Screening	<code>loan_candidate_screening.py</code>	Semi-Automated	—
Bank Reconciliation	(Planned — RM Bank Sync)	None	—

Projects in This Space:

| Project | Status |

|-----|-----|

- | Monthly Portfolio Reporting | Active |
- | Data Pipeline Consolidation | Complete |
- | Delinquency Risk Forecasting | Phase 1 Complete |
- | Probability Engine | Phase 2 Complete |
- | RM Expense Audit | Active |
- | Late Fee Audit | Active |
- | AP Automation Pipeline | Frozen |
- | Bank Reconciliation Automation | On Hold |
- | Loan Candidate Screening | Complete |
- | Software Expense Optimization | Active |
- | Fund-Level Cost Visibility | Planned |

Dashboards:

- KPI Dashboard (`kpi-dash-board-d9y.pages.dev`)
- Occupancy Dashboard
- Economic Forecast (Google Sheet)
- Delinquency Risk (Google Sheet)

Key Insight: Finance is the MOST automated department by AI tooling but has ZERO SOPs. Carlos IS the documentation for all of these workflows. If Carlos is unavailable, nobody knows how to run the monthly KPI cycle, trigger the delinquency model, or interpret the dashboards. **This is exactly the "Carlos IS the interface" problem the Sunrise Machine is designed to solve.**

IT Operations — ZERO PLAYBOOKS, MODERATE AI

Workflow	AI Tools	Level	Workflow Map
System Provisioning	google-admin-expert skill, ringcentral-expert skill, paychex-expert skill, it-operations-specialist agent	Detected	O2
System Deprovisioning	Same as above	Detected	O3
Incident Response	cybersecurity-expert skill, security-guardian agent	None	—
Password/Access Management	google-admin-expert skill	None	—
Phone System Admin	ringcentral-expert skill, ringcentral-specialist agent	Manual	—
Dashboard/Worker Deploys	/deploy-pages command, /deploy-worker command, deployment-verifier agent	Semi-Automated	—

Workflow	AI Tools	Level	Workflow Map
Internal Ticketing	Ticketing system at <code>tickets.suncom.work</code>	Automated	—
Security Hardening	<code>cybersecurity-expert skill, security-guardian agent, cloudflare-expert skill</code>	Manual	—

Projects: Internal Ticketing (Complete), Dashboard Security Hardening (Complete), RingCentral Phone System (On Hold), Encrypted Cloud Drive (Complete), Sunrise Sentinel (Operational)

Key Insight: IT is the second-most AI-enhanced department with zero playbooks. The Access Audit (completed March 2026) proved the "Carlos dependency" is a real risk — RM had severe admin sprawl because provisioning/deprovisioning isn't documented.

Property Operations — ZERO PLAYBOOKS, STRONG AI

Workflow	AI Tools	Level	Workflow Map
Rent Increases	<code>mhp-regulatory skill, fair-housing skill, resident-communications skill, compliance-monitor agent, resident-communication-specialist agent</code>	Manual	Part of F5
Resident Communications	<code>resident-communications skill, resident-communication-specialist agent, fair-housing skill</code>	Manual	O4
Lease Administration	<code>mhp-regulatory skill, compliance-monitor agent</code>	None	—
Evictions	<code>mhp-regulatory skill, fair-housing skill, compliance-monitor agent</code>	None	—
Resident Complaints	<code>resident-communication-specialist agent</code>	Manual	—
Emergency Procedures	None	None	—
Community Rules Enforcement	<code>mhp-regulatory skill, fair-housing skill</code>	None	—
Collections	<code>delinquency_risk_model.py, delinquency-model skill</code>	Semi-Automated	—

Projects: SMS Statement Reminders (Proposal Ready — \$41K/yr savings), Occupancy Dashboard (Complete), Sunny AI (Complete)

Dashboards: Occupancy Dashboard, Sunny AI (`sunny-cm.suncom.work`)

Key Insight: Resident-facing workflows have the highest compliance risk (Fair Housing) and the strongest AI skill coverage — but zero playbooks to anchor them. The fair-housing skill exists as a reactive safety net, not a proactive workflow gate.

Maintenance & Facilities — ZERO PLAYBOOKS, MINIMAL AI

Workflow	AI Tools	Level
Work Orders	None	None
Emergency Maintenance	None	None
Vendor Dispatch	None	None
Infrastructure Inspections	capital-projects-analyst agent (CapEx planning only)	None
Utility Monitoring	None (Ridgebrook Water planned)	None

Projects: CapEx & WIP Budget Comparison (On Hold), Ridgebrook Water Deep Dive (Planned)

Key Insight: Maintenance is the LEAST AI-enhanced department. Ops doesn't use work orders in RM (the Work Order Triage project was removed as "not viable"). This is a pure operations gap, not an AI gap — you can't automate what doesn't have a defined process.

PART 3: AUTONOMOUS OPERATIONS LAYER (Sentinel + Crons)

The Sunrise Sentinel and scheduled tasks form the **always-on** layer of the Sunrise Machine.

Agent/Task	Trigger	Frequency	What It Does	Connects To
Daily Briefing v2	LaunchAgent (6am)	Daily	Gmail + Calendar + Tasks + Slack + 4 Forms → action-oriented PDF	O1, O2, O3
Auth Health Check	LaunchAgent	Daily	Verifies CF Access tokens, MCP auth, API keys	Security
Service Heartbeats	LaunchAgent	Every 30min	Pings all dashboards + services, alerts on failure	All dashboards
Project Auto-Sync	LaunchAgent	Every 30min	MacBook → Mac Mini file sync	Infrastructure
KPI Export	Manual (monthly)	Monthly	export_monthly_kpi_dashboard.py → Google Sheets	F1
Occupancy Export	Manual (monthly)	Monthly	export_occupancy_dashboard.py → Google Sheets	F1

Agent/Task	Trigger	Frequency	What It Does	Connects To
Delinquency Model	Manual (monthly)	Monthly	delinquency_risk_model.py → Google Sheets	Collections
Economic Forecast	Manual (quarterly)	Quarterly	export_forecast_dashboard.py → Google Sheets	F4, S2
Loan Screening	Manual (quarterly)	Quarterly	loan_candidate_screening.py → Report	autoMHatic

Gap: Only 4 tasks are truly automated (Sentinel LaunchAgents). The 5 export scripts could be automated via Sentinel cron but are currently manual triggers.

PART 4: DECISION SUPPORT LAYER (Dashboards)

Dashboard	URL	Data Source	Playbook Connection	Update Frequency
KPI Dashboard	kpi-dashboard-d9y.pages.dev	RM API → Google Sheets → CF Pages	None (Finance has no playbooks)	Monthly
Occupancy Dashboard	CF Pages	RM API → Google Sheets → CF Pages	None	Monthly
IC Deal Tracker	acquisitionsic.suncom.work	Excel extraction → CF Worker → D1	Acquisitions VE (tracks deals through pipeline)	Per-deal
Sunny AI	sunny-cm.suncom.work	RM API + Knowledge Base	Operations VE (resident self-service)	Real-time
Internal Ticketing	tickets.suncom.work	Google Sheets + CF Worker	IT Operations (no playbook)	Real-time
AP Automation	ap.suncom.work	Invoice upload → OCR → QBO matching	None (FROZEN)	Frozen

PART 5: HUMAN INTERFACE LAYER (Skills Catalog Preview)

Skills by Business Domain

This is what the Skills Catalog will present to staff — "what can AI do for MY job?"

For: Acquisitions Team (Kirk, Kate, Chiqui)

Capability	Tool	How to Invoke	What It Does
Score a deal	mhp-acquisitions-expert skill	Ask Aurora	Evaluates deal against Buy Box, scores 0-100
Research a market	market-intelligence-analyst agent	Ask Aurora	Demographics, comps, risk assessment for target market
Find property owners	osint-investigator agent	Ask Aurora	Pierce LLCs, find human decision-makers
Get owner contact info	contact-information-researcher agent	Ask Aurora	Phone, email, LinkedIn for target owners
Check lot rent comps	market-rent-analyst agent	Ask Aurora	Competitive rents and occupancy for specific markets
Form a new entity	entity-formation skill	Ask Aurora	Full LLC formation checklist with BOI/CTA
Prepare IC memo	board-reporting-synthesizer agent	Ask Aurora	Synthesize DD into investment committee format

For: Investor Relations Team (Kelvin, Kate, Chiqui, James)

Capability	Tool	How to Invoke	What It Does
Pre-call investor brief	IR Intelligence Layer (in development)	—	HubSpot + Windfall data synthesized before calls
Research a podcast host	gemini-research-specialist agent	Ask Aurora	Background, audience, talking points for podcast prep
Draft investor update	board-reporting-synthesizer agent	Ask Aurora	Quarterly investor letter in appropriate tone
Fund accounting questions	pm-accounting-expert skill	Ask Aurora	Waterfall, K-1, capital accounts, distributions
HubSpot workflow help	hubspot-expert skill	Ask Aurora	CRM configuration, workflow setup, reporting

For: Operations Team (Todd, Colt, CMs)

Capability	Tool	How to Invoke	What It Does
Draft a resident notice	resident-communications skill	Ask Aurora	Rent increase, maintenance, policy notices
Check state regulations	mhp-regulatory skill	Ask Aurora	Notice periods, eviction rules, deposit limits by state
Fair Housing review	fair-housing skill	Ask Aurora	Review any communication or policy for FH compliance
Resident risk scoring	Delinquency Risk Model	Monthly report	Flags tenants likely to miss rent for early outreach
Community Q&A	Sunny AI	sunny-cm.suncom.work	Residents get instant answers about community rules

For: Finance Team (Mike, accounting hires TBD)

Capability	Tool	How to Invoke	What It Does
Monthly KPI analysis	portfolio-performance-analyst agent	Ask Aurora	Variance analysis, benchmarking, trend identification
Expense audit	financial-auditor agent, /rm-expense-audit	Ask Aurora	Flag duplicates, anomalies, vendor concentration
GL reconciliation help	financial-auditor agent	Ask Aurora	Month-end close support
RentManager accounting	rm-accounting-expert skill	Ask Aurora	GL codes, charge types, P&L questions
Divvy card audit	divvy-expense-audit skill	Ask Aurora	Receipt compliance, spend analysis
Economic forecast	economic-forecast skill	Quarterly report	Recession probability, rate impacts, scenario planning

For: HR (Ariana)

Capability	Tool	How to Invoke	What It Does
Policy questions	hr-operations-specialist agent	Ask Aurora	Multi-state employment law, benefits, compensation
Draft job descriptions	hr-operations-specialist agent	Ask Aurora	JDs with EEO/ADA language
Payroll/Paychex help	paychex-expert skill	Ask Aurora	Flex admin, tax filings, Stratustime

Capability	Tool	How to Invoke	What It Does
Insurance questions	insurance-risk-expert skill	Ask Aurora	Workers comp, liability, coverage gaps

For: Leadership (Brian, Sam, Kevin)

Capability	Tool	How to Invoke	What It Does
Board materials	board-reporting-synthesizer agent	Ask Aurora	IC memos, investor updates, strategic narratives
EOS/L10 prep	eos-scorecard-analyst agent	Ask Aurora	Scorecard analysis, Rock tracking, issues list
Risk assessment	risk-assessment-strategist agent	Ask Aurora	SWOT, scenario planning, crisis response
Portfolio performance	portfolio-performance-analyst agent	Ask Aurora	KPI trends, underperformance investigation
Content syndication	Sage Brand (8 agents)	sage-app.suncom.work	Podcast → blog → social → newsletter pipeline

For: IT / Carlos

Capability	Tool	How to Invoke	What It Does
Everything above	All 25 skills + 21 agents	Direct	Carlos is the primary Aurora user
Cloudflare admin	cloudflare-expert skill	Direct	Workers, Pages, D1, Access, DNS
Google Workspace admin	google-admin-expert skill	Direct	Users, groups, security, SSO
RingCentral admin	ringcentral-expert skill	Direct	IVR, queues, extensions, multi-site
Security hardening	cybersecurity-expert skill	Direct	Vulnerability management, access control
Code deployment	deployment-verifier agent	Direct	Pre-deploy build/test verification

PART 6: SUMMARY HEAT MAP

Coverage by Department

Department	Value Engines	Playbooks	AI Tools	Automation Level	Coverage Grade
Acquisitions	3	11	12 agents, 2 skills	Manual (tools exist, not chained)	B-
Investor Relations	5	16	3 agents, 2 skills	Manual (IR Layer in dev)	C+
Operations (Home Sales)	2	5	3 skills, 1 agent	None (critical FH gaps)	D
Asset Management	1	3	2 agents	Manual (meta-process)	C
Leadership/EA	1	6	2 skills	Detected (daily briefing only)	D+
Org-Wide (HR)	3	10	3 skills, 2 agents	Detected (form intake only)	C-
Finance	0 VEs, 0 PBs	0	7 scripts, 4 skills, 3 agents, 3 dashboards	Semi-Automated	A- (tools) / F (docs)
IT	0	0	4 skills, 3 agents, 2 commands	Semi-Automated	B (tools) / F (docs)
Property Ops	0	0	4 skills, 2 agents, 1 dashboard	Manual	C (tools) / F (docs)
Maintenance	0	0	1 agent	None	F

Coverage by Sunrise Machine Layer

Layer	% Built	Playbook Coverage	Key Gaps
1. Data Ingestion	~70%	N/A (infrastructure)	HubSpot not pipelined, county/market data manual
2. Knowledge Base	~40%	0% (no playbooks reference KB)	Wiki structure, cross-refs, ingest workflows
3. Intelligence Processing	~60%	~30% (agents exist but not connected to playbooks)	Sentiment analysis, predictive maintenance
4. Autonomous Operations	~50%	~5% (only daily briefing detects form events)	Monthly exports still manual, Sentinel v3
5. Decision Support	~60%	~10% (dashboards exist but playbooks don't reference them)	Income Statement, fund-level visibility

Layer	% Built	Playbook Coverage	Key Gaps
6. Human Interface	~40%	0% (Skills Catalog not built, Aurora Hub planned)	Staff can't discover tools without Carlos

PART 7: TOP PRIORITIES (What to Build Next)

Priority 1: Close the Documentation Gap (Finance + IT + Ops)

Why: The three most AI-enhanced departments have zero playbooks. The Sunrise Machine has a powerful engine with no owner's manual.

Action	Impact	Effort
Document the Monthly KPI Cycle as a playbook	Removes Carlos single-point-of-failure on most important recurring process	1 day
Document IT Provisioning/Deprovisioning as a playbook	Enables backup IT person to onboard/offboard	Half day
Document Rent Increase Process as a playbook	Highest compliance risk undocumented workflow	1 day

Priority 2: Connect the Chains (Workflow Orchestration)

Why: Tools exist but are siloed. The Workflow Map identified 18 of 23 workflows as "manual/siloed."

Chain	Tools to Connect	Impact
A1→A2 (Deal Sourcing → Screening)	Gmail MCP → structured extraction → deal scoring → Slack alert	First end-to-end acquisition automation
F1 (Monthly KPI Cycle)	/run-monthly-workflow → validation → export → deploy → notify	Removes 4-6 hours of Carlos time/month
O2/O3 (On/Offboarding)	Form detection → guided checklist → system provisioning tracking	Closes the "detected but not acted on" gap

Priority 3: Build the Skills Catalog (Human Interface Layer)

Why: Part 5 of this matrix IS the content for the Skills Catalog. Staff need a front door.

Action	Impact	Effort
Deploy Part 5 as browsable CF Pages site	Staff can discover AI tools without Carlos	2-3 days

Action	Impact	Effort
Add "Try It" examples for each capability	Lowers barrier to first use	1 day
Link each capability back to its Value Engine/Playbook	Shows AI as workflow enhancement, not standalone tool	1 day

Priority 4: Compliance Gates (Audit Findings → Automation)

Why: The Playbook Library Audit found 28 pre-go-live issues. AI agents should be mandatory gates on high-risk workflows.

Gate	Agent	Playbook	Risk Mitigated
Fair Housing review before community approval	compliance-monitor	Home Sales: Apply for Community Approval	Disparate impact (CRITICAL)
Compliance review before investor marketing	compliance-monitor	Fund Launch: Create Marketing Materials	SEC violation (HIGH)
Dual-approval check on distributions	financial-auditor	Waterfall: Approve Distribution	Financial controls (CRITICAL)
TCPA check before IR power dialing	compliance-monitor	Lead Qualification: Call Lead	\$500-\$1,500/violation (HIGH)

APPENDIX A: AI Tools Not Connected to Any Playbook

These tools exist in the Sunrise Machine but have no formal workflow anchor:

Tool	Type	Current Use	Should Connect To
economic-forecast skill	Skill	Quarterly macro report	F4, F5, A2 (deal screening overlay)
kpi-analysis skill	Skill	Ad hoc KPI questions	F1 (monthly cycle interpretation)
training-content-developer agent	Agent	Training material creation	All playbooks (onboarding training for each)
security-guardian agent	Agent	Pre-deploy security checks	IT Ops playbooks (when they exist)
glm-coding-agent agent	Agent	Code review/generation	IT Ops, script maintenance
automation-architect agent	Agent	Workflow analysis	Process Documentation VE
gemini-workflow-designer agent	Agent	AI workflow design	Process-to-Agent Framework

Tool	Type	Current Use	Should Connect To
Probability Engine	Script	Portfolio economic forecasting	F4, S2, investment strategy
Loan Candidate Screening	Script	autoMHatic referrals	Operations (resident programs)

APPENDIX B: Playbook Audit Findings ↔ AI Tool Remediation

Cross-reference of the 28 pre-go-live audit findings with AI tools that could prevent or detect the issue:

Finding #	Issue	Severity	AI Tool That Could Help	How
1	506(c) accreditation gaps	CRITICAL	compliance-monitor agent	Mandatory gate before investment close
2	Marketing materials no compliance review	HIGH	compliance-monitor agent	Auto-review before publish
3	TCPA risk in power dialing	HIGH	compliance-monitor agent	Pre-call compliance check
4	Waterfall no dual-approval	HIGH	financial-auditor agent	Reconciliation verification step
5	No screening criteria	CRITICAL	fair-housing skill	Generate compliant criteria template
6	Steering risk in showings	HIGH	fair-housing skill	Audit trail of homes shown + reasoning
7	Missing lead paint disclosure	HIGH	compliance-monitor agent	Auto-flag pre-1978 homes
8	Missing I-9/W-4/benefits in onboarding	CRITICAL	hr-operations-specialist agent	Compliance checklist enforcement
9	Final pay conditioned on clearance	CRITICAL	hr-operations-specialist agent	Flag non-compliant language
10	No FCRA in background checks	HIGH	hr-operations-specialist agent	FCRA checklist template
15	SSN in shared spreadsheets	CRITICAL	security-guardian agent	PII detection in shared docs
16	Passwords in shared sheets	HIGH	security-guardian agent	Credential detection
17	Wire transfer no dual-control	CRITICAL	financial-auditor agent	Verification workflow
22	No access revocation timeline	HIGH	it-operations-specialist agent	Deprovisioning checklist with SLAs

Matrix compiled by Aurora. Source data: Playbook Library (65+ SOPs), WORKFLOW_MAP.md (23 workflows), PROJECT_TRACKER.md (64 projects), 25 skills, 21 agents, 10+ production scripts, 6 dashboards.

Next step: Apply Process-to-Agent Framework scoring rubric to each row. Then deploy Part 5 as the Skills Catalog.