



A Guide on How to Run a Head-to-Head AI Pilot

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Introduction

So you've decided to run a head-to-head pilot. A battle of the bots. You've determined you need a Virtual Leasing Assistant at your property, you've narrowed down your list of potential vendors, and now it's time for some test runs to choose who you want to partner with ultimately.

This is the story for more and more property management companies today. Running a competitive pilot can be hard. It's work for you, it's work for your onsite teams, and it's work for your vendors. When done right, the result is a low-risk partnership with the right solution. That confidence comes from doing the upfront work to validate results, experience, and capabilities.

This guide is here to help you confidently run a head-to-head AI pilot. It includes best practices, key steps, and what to watch out for so you can make the right decision for your property.

Now before I begin, let's address the elephant in the room. Yes, I run an AI company that offers a Virtual Leasing Assistant. So you might assume I'm biased. But I've spent years studying AI, and I genuinely want to help our industry understand how to evaluate it. I like to think of myself as a bit of an AI nerd. So here's my promise: I won't try to sell you on Nurture Boss in this guide. Our Google reviews can do that.

Alright. Let's dive in.

Step 1 - Do You Really Need a Virtual Leasing Assistant?

The first thing we need to do is confirm that a Virtual Leasing Assistant (VLA) is the right solution for the pain points you are trying to solve. Typical pain points a VLA solves for include, but are not limited to:

- Understaffed onsite teams
- Need for efficiency for centralized leasing teams
- Increasing marketing spend per unit at your properties
- Subpar lead-to-tour conversion rates
- Low occupancy
- High vacancy loss
- Subpar lead-to-lease conversion rates
- High volume of missed phone calls at the leasing office
- Subpar on-time rent payments
- Increasing delinquencies at your properties
- Low or insufficient online reputation

Do any of these problems sound familiar to you for your portfolio? If so, a VLA is right for your properties. Once you've determined that a VLA could address your pain points, it's time to move on to Step Two.

Step 2 - Identify What Success Looks Like.

You might think Step Two is to "look for a VLA" but it's not. Before you even start your software search, you should intimately understand the problems that you are trying to solve, what solving those problems actually looks like, and how that is measured.

"It's easy to get distracted by flashy features and good salespeople. The best way to defend against this is to relentlessly focus on why you are shopping for a VLA in the first place."

Clarify each problem you're trying to solve, then sketch out what success would look like if that problem were fully solved. **Below is a template you can use and repurpose for your own use cases.**

Problem	Vision of Success with VLA	Success Metrics
Our lead-to-tour conversion rates are at 22%. We're overspending on leads because we're not converting enough of them into tours.	We consistently convert 35% of leads into tours. That means more leases and less money spent on ILS because we're making better use of the leads we already have.	We need lead-to-tour conversions of 35% or higher. We need a reduction in ILS spend by 20%.
On-time rent payments are at an all-time low of 92%. In 2025, our delinquent ledger balance has been steadily increasing.	We want more on-time rent payments and better collection efforts, which means more money in our operating account.	We need an increase in on-time rent payments to 97%. We need to decrease delinquent ledger balances by 45%.
Our leasing team is often unable to answer the office phone. We miss too many calls from prospects that could lead to tours and leases.	We want the VLA to answer more calls, ensuring we create as many opportunities as possible for our leasing team.	We need to capture 100% of the calls to the leasing office, no matter the day or time.
Our renewal rates are hovering around 50%. This is increasing our vacancy loss and negatively affecting NOI at our properties.	We strive to increase resident satisfaction and renewals. Understanding the sentiment of each resident will allow us to stay ahead of any renewal risks.	Resident sentiment reports are delivered to the onsite team. Renewal rates need to increase by 45%. We'd like a 35% increase in our online Google rating.

Step 3 - Identify Potential VLA Partners.

Okay, we're making great progress. We have clearly identified that a VLA can provide a positive impact at our properties, and more importantly, we have clearly defined what that positive impact looks like. Time to start shopping!

You might be asking yourself:

How do I learn about my AI options?

- How do I know what's out there?
- How do I find the right solution for my team?
-

All the VLA providers are constantly marketing and spreading the word, so you are probably already aware of a few options. Start by adding those providers to your list. Next, do some of your own research to find other potential options. I share some ideas below.

"Remember, the goal is to find the solution that is best for your specific problems, not to leverage the solution that puts the most money into their marketing efforts."

Below are some recommendations on how you can learn what options are available to you.

- **Check Revyse.** Revyse is an independent review site built specifically for the multifamily industry. Revyse lists various vendors, by category, and has unbiased industry feedback. On Revyse you can read reviews from your peers and hear what operators are saying about each vendor.
- **Check Google Reviews.** For any vendor you add to your list, take a few minutes to do some background research. If one stands out, search for them on Google and read their reviews. Google Reviews are public and unfiltered, giving you real, honest feedback from others who have worked with that vendor.
- **Ask your network on LinkedIn.** Everyone in multifamily is there, and it's a great place to crowdsource insights. Post a question, share what you're researching, and invite others to share their experiences. Here is an example of what we mean: *"Calling all multifamily operators! We are researching for AI and Virtual Leasing Assistants at our company and I'd love to hear what you all have found. Has any VLA solution stood out to you? Any positive or negative experiences you can share? I'd love to get thoughts from my LinkedIn network!"*
- **Run a Google Search.** Type "Virtual Leasing Assistants for Multifamily" into Google and start scrolling. Here you can take your own time to view websites, learn a little about each vendor, and decide who to add to your list.
- **Ask ChatGPT.** Type in "What are the best Virtual Leasing Assistants for Multifamily?". Just like Google, take your time reviewing the list, check out websites, ask ChatGPT follow-up questions, and decide who you want to add to your list.
- **Ask your peers privately.** This is the most impactful and important suggestion. Reach out to your personal network. Ask your peers what research they've done, what they've used, and who they recommend. In my experience, nothing holds more weight than a personal recommendation.

Step 4 - Create Your Internal Selection Process and Get Buy-In.

You've done the research, identified your top AI vendors, and you're ready to set up demos. But before jumping in, make sure you have internal buy-in and a clear understanding of your company's buying process.

If your software buying process isn't clearly defined yet, now's the time to figure it out. The good news is you've already outlined why this software matters and what success looks like in Step Two, so you're ready to have those internal conversations about why you should pilot an AI vendor — and how.

To successfully create your internal process, it means you will have the following defined:

- Who is on the selection committee?
- What properties in your portfolio will be a part of the pilot? *I cover this topic in more detail below.*
- Are onsite teams, Regionals, and RVPs aware of the pending pilot and have bought in on it?
- Are the affected departments aware of what may be asked of them during the pilot? Meaning:
 - Operations
 - IT
 - Marketing
 - Accounting
- Are the right parties who will be required to approve decisions bought in and prepared to execute when vendors have been selected?
- Has the timeline been created?
 - Vendor selection by X date
 - Contract signed by X date
 - Pilots live by X date
 - Pilots complete by X date
 - Pilot results analyzed by X date
 - Final partner decision and broad rollout by X date

What properties should you pilot? This is an important question. The properties you select should match the makeup of your portfolio. For example, maybe you choose:

- 1 Class B property
- 1 Class C property
- 1 property with low occupancy
- 1 property from each major city where you manage assets

This approach gives you solid data to compare how each vendor or VLA impacts your portfolio. Whenever possible, launch the pilots at the same time, using the same number and variety of properties, and run them for the same length of time. To compare apples to apples, the pilot environments should be as similar as possible.

"Spend the time upfront to design a path to success, this allows you to spend the entire pilot focused on the pilot and its results."

Lastly, starting a pilot without a clear view of what happens 6 to 12 months down the line sets you up to fail. Imagine running a successful pilot, seeing great results, only to find out your company has no plans to adopt AI until 2027. Not ideal.

Step 5 - Set Up Introductory Calls with the Right Questions.

Now that you've done your research, it's time to hear directly from the vendors. Start by setting up intro calls. The easiest way to do this is by filling out the contact or demo forms on their websites. Vendors typically respond quickly, so you can get a meeting scheduled right away.

I recognize some people prefer to do their own research instead of talking to a salesperson, and that's totally valid. But I recommend scheduling a demo. It gives the vendor a chance to understand your specific pain points and tailor the conversation to what actually matters to you.

Remember the list we made in Step Two? The one that emphasizes the problems you are trying to solve and what success looks like? **Share this with the vendor.** The worst thing you can do is keep this a secret. Let the vendor know what you care about and what a successful outcome looks like. Any good software salesperson will immediately dig in, and speak to how their platform can help with the problems you've identified and how they can measure success.

What to Ask During Your Demos

These questions will help you dig deeper and make the best decision:

- **Integrations:** Does the vendor require your onsite team to learn a new platform and log in repeatedly? Or does all data flow seamlessly back into your existing CRM or PMS so your team sticks to their usual system?
- **AI Capabilities:** How "agentic" is the AI? Can it not only talk with prospects and residents but also interact directly with your CRM or PMS to take action? This ability is key for any successful Virtual Leasing Assistant. Personalized Messaging: Does the AI adjust its behavior based on where the renter is in the lead-to-lease or lease-to-renewal process? Messaging should differ greatly between someone who hasn't toured and someone applying.
- **Human Handoff:** How does the VLA decide when to bring in a human? And how does it notify that person? AI Improvement: How does the AI get better over time? Is there human oversight from the vendor? How are conversations monitored and quality ensured?
- **Insights & Analytics:** Can the AI provide operators and leadership with insights, pattern recognition, and analytics to support smarter decisions?

- **Implementation & Support:** What does the implementation process look like? What kind of support is available after launch?

Want a List of Questions to Ask Your AI Vendors?

"Buying AI software doesn't mean you can skip having human support. It's essential that your vendor offers best-in-class customer service and will support you at every step. This should be a requirement for anyone you choose to work with."

Step 6 - Choose 2-3 AI Partners to Pilot.

You will likely have several calls and meetings during your vendor search. After your initial intro calls, it's a good idea to invite other members of your buying committee to join future conversations.

By following the process you set in Step Four, involving your potential vendors, and thoroughly demoing all your options, you'll narrow your list down to two to three top vendors.

Moving along, let's assume you double-checked that the vendor addresses the pain points from Step Two, the cost structure fits within your budget, and you're happy with how the vendors answered your questions outlined in Step Five.

Now it's time to explore the go-live process, including next steps after signing, implementation needs, onsite training, and ongoing support. Understanding the go-live process is crucial because it sets the stage for a smooth and successful pilot launch. By knowing what happens after signing helps you plan resources, timelines, and team involvement, so nothing gets overlooked.

Here are some key questions to ask:

- What are the exact next steps once the contract is signed?
- How long does implementation take, and what does it involve?
- Who handles the heavy lifting — your team or mine?
- How often will we stay informed on the results of our pilot?
- What kind of ongoing support is available after launch?

Getting clear answers ensures your team is ready, confident, and supported throughout the entire process. It helps avoid surprises and keeps the pilot on track for success.

"You can negotiate your contract. You don't have to sign what is put in front of you. Be sure to carefully review what you are signing and make sure it is fair."

Step 7 - Launch Your Pilot.

Okay, you've done a lot of work! Let's acknowledge that. The research and preparation you've done before choosing which VLAs to pilot have set you and your company up for success.

Quick reminder: choosing a mix of properties helps you see how the new technology performs in different situations.

"PMCs often pick their "best" properties to pilot on. This can lead to misleading results. If you have a rockstar onsite team in a great market, most software will perform well no matter what."

Step 8 - Measure Results Weekly.

Remember when we defined what success looked like back in Step Two? Well this is where the rubber hits the road.

Ensure you have access to real-time data for how each piece of technology is performing at your properties. Additionally, during a pilot, you should have, at a minimum, monthly calls on the calendar with your vendor partners to review results and make adjustments where necessary.

"When you pilot new technology, you aren't just measuring how good the technology is; you are also measuring how well you and your vendor work together."

Everything is not going to go perfectly, and that's okay. Learning how you and your vendor work through problems together is a key anecdotal metric you should be measuring during the pilot process.

As a general rule of thumb, here are some things you should watch for and measure throughout the entire pilot process:

- Impact on KPIs from Step Two:
 - For example, if you aim to boost lead-to-tour conversion from 25% to 35%, make sure you have dashboards set up to track progress.

- Vendor Experience:
 - How do they handle feedback?
 - Are they easy to reach?
 - How quickly do they respond and resolve issues?
 - Do they act on your input?
- Stakeholder Feedback:
 - Is the onsite team seeing daily improvements?
 - Are prospects and residents having better experiences?
 - Is marketing noticing a difference?
- VLA Visibility and Monitoring:
 - Can you easily track what the VLA is doing?
 - Are conversations imported into your CRM, or do you need a separate login?
 - Can you listen to call recordings?
 - How often does the VLA escalate to a human?

Staying on top of things from day one on your pilot properties will let you get great data around how the VLA performance evolves over the lifetime of the pilot.

Step 9 - Select the Right Partner.

You're now close to the finish line! Let's assume you have been running a VLA pilot across a few vendors at multiple sites for 90-180 days. You've collected results, you've built relationships, and now the time has come. You have to pick a winner that is right for you and your company.

Ideally, at this point, you have answers to all of the questions below:

- Did the VLA improve upon and hit my target for KPI #1, #2, #3, and so on?
- Did my onsite teams perceive the value of the VLA?
- Did my onsite team have more time to focus on building human relationships while the VLA managed follow-ups and other communication?
- Was there any feedback that is relevant from prospects or residents at my properties?
- How long did implementation take and is it easily repeatable across all my properties?
- Is the implementation process overburdensome to any of my teams?
- Do I understand the level of customer support, channels I have access to the vendor through, average response times, average time to resolution, and does this meet my needs?
- Do my onsite teams and I have access to VLA conversations through our CRM and PMS, or do we need to log in to another platform?
- Did the AI powering the VLA improve throughout the pilot? Does this AI learn and get better, or did results and outcomes stay consistent through the entirety of the pilot? *Note: It should have improved.*

- Do I clearly understand my contract terms?
 - What is my post-pilot pricing?
 - What is the length of the agreement?
 - Am I able to cancel and under what restrictions?
 - What is the strategic pricing, and how does it change as I add more properties?
- If I choose to change other pieces of my tech stack down the line, will this AI vendor still be able to work with me? (Is the VLA technology agnostic?)

Choosing a VLA vendor is a lot like dating. You're not just picking a product. You're starting a relationship. You should have clear expectations, watch how they show up, and make sure they follow through. This isn't a one-time transaction, it's a long-term partnership. Swipe wisely.

"Ultimately, when you choose an AI vendor or VLA you are choosing an experience your prospects and residents will have. It's a big decision, and good preparation will set you up for success throughout the entire journey!"

Step 10 - Share Your Learning with Your Peers.

You've done the work. You defined your goals, explored your options, ran thoughtful pilots, and made the best call for your company and your portfolio.

Now, share what you've learned.

Operators, marketers, and owners across multifamily are facing the same decisions. It's not easy, and there's no playbook — until now. So be the person who helps someone else get it right. After all, we are all trying to figure it out together.

"Sharing your experience is a great way to pay it forward and support peers who are navigating the same decisions. Your insights can offer clarity, save them time, and help them feel less alone in the process!"