

FOR HOA MANAGEMENT COMPANIES

YOU KNOW THE COMMUNITIES. I BUILD THE SYSTEM FOR EACH HOA.

Recommend Automate with Jake to associations that need a clearer resident communication lane. I work directly with each HOA to build, launch, train, or manage its own text-update system.



SEPARATE SYSTEM. SEPARATE AGREEMENT. HOA OWNERSHIP.



**YOU MAKE THE INTRODUCTION.
I HANDLE THE HOA-SPECIFIC BUILD.**

THE REFERRAL OPPORTUNITY

YOUR MANAGERS ALREADY KNOW WHICH COMMUNITIES NEED BETTER MESSAGE VISIBILITY.

When residents repeatedly say, “I never saw it,”
your team can connect that HOA with a specialist.



SPOT THE GAP

Identify an association
where routine or
time-sensitive updates
are often missed.



MAKE THE INTRODUCTION

Connect Automate
with Jake with the
board president,
manager, or
authorized HOA leader.



STAY OUT OF THE OPERATOR ROLE

Your company does not
need to purchase, own, or
run a portfolio-wide
texting platform.



HOA



HOA



HOA



HOA



HOA

EACH HOA DECIDES, CONTRACTS, AND LAUNCHES SEPARATELY.



The management company stays the trusted connector -
not the text-system operator.

HOW THE REFERRAL WORKS

YOU OPEN THE DOOR.

I WORK DIRECTLY WITH EACH HOA.

01

IDENTIFY

Your team selects an association that may benefit from a resident text-update channel.



02

INTRODUCE

Connect me with the board president, community manager, or authorized HOA leader.



03

DISCOVER

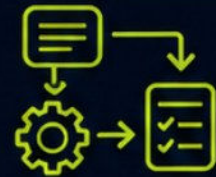
I map that HOA's use cases, approvals, communication gaps, and channel boundaries.



04

BUILD

I create its enrollment flow, starter templates, approval process, testing, and launch plan.



05

CHOOSE SUPPORT

The HOA selects ongoing management or a trained handoff with hourly help when needed.



ONE INTRODUCTION. ONE DIRECT HOA RELATIONSHIP.
ONE SEPARATE SYSTEM.



EACH HOA INVITES ITS OWN RESIDENTS.

01



APPROVE

The HOA approves its message categories, invitation wording, frequency, and boundaries.

02



INVITE

The HOA shares the approved program through its existing communication channels.

03



CHOOSE

A resident takes the required affirmative action to request enrollment.

04



WELCOME

The resident receives the program identity, expectations, help, and opt-out information.

05



CONTROL

Residents can opt out, and the HOA retains its own enrollment and message records.



IMPORTANT

Management-company access or a resident directory is not SMS consent. Each association keeps its own enrollment and opt-out records.



CLEAR INVITATION. RESIDENT CHOICE. HOA-LEVEL RECORDS.

USE TEXT WHERE TIMING AND VISIBILITY MATTER MOST.



AMENITIES

Pool hours, temporary closures, court availability, or access updates.



PLANNED MAINTENANCE

Landscaping, paving, inspections, service work, or expected disruptions.



MEETINGS

Board, annual, town-hall, or committee reminders with an approved details link.



COMMUNITY EVENTS

Dates, times, locations, RSVP reminders, and last-day notices.



SERVICE INTERRUPTIONS

Known, non-emergency operational updates and restoration information.



FEEDBACK + FOLLOW-UP

Approved surveys, registration reminders, or summary links.



BOUNDARY

Required, legal, governing-document, certified-mail, portal, and emergency notices remain in their established channels.



TIMELY INFORMATION - NOT AN EMERGENCY OR REQUIRED-NOTICE SERVICE.



PER-HOA PRICING

ONE HOA-SPECIFIC BUILD. TWO WAYS TO RUN IT.

FOUNDATION BUILD

\$1,100

ONE-TIME
PER HOA

- ✓ Discovery and use-case map
- ✓ One voluntary resident enrollment flow
- ✓ Sender setup support and launch testing
- ✓ Welcome, help, and opt-out language
- ✓ Approval workflow and four starter templates
- ✓ Quick-start documentation

DONE-FOR-YOU MANAGEMENT

\$249

/ MONTH
PER HOA

- ✓ Up to four approved broadcasts per month
- ✓ Flow maintenance and troubleshooting
- ✓ Simple activity reporting
- ✓ The HOA approves its messages

TRAIN + HANDOFF

\$125

/ HOUR

- ✓ Live admin training and guided practice
- ✓ Template edits, troubleshooting, and future additions
- ✓ The HOA runs its day-to-day channel
- ✓ Support is booked only when requested



Direct provider, registration, carrier, messaging, printing, and third-party fees are separate.

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THE OPERATING MODEL

EACH ASSOCIATION **OWNS** ITS OWN SYSTEM.



DIRECT HOA AGREEMENT

Scope, pricing, approvals, access, and support are defined with each association separately.



SEPARATE IDENTITY

Each HOA has its own sender identity, number, templates, and message history.



SEPARATE CONTACTS

Resident lists and consent do not transfer between associations managed by the same company.



HOA APPROVAL

The authorized HOA contact approves use cases, invitations, templates, and broadcasts.



LIMITED ACCESS

Automate with Jake receives only the access needed for the selected service path.



CLEAN HANDOFF

When training is chosen, the HOA takes over operations and books future support only as needed.



MANAGEMENT COMPANY ROLE

The management company may stay informed, but it is not required to own or operate the system.



FINAL REVIEW

The HOA and its counsel review final consent wording and required-notice boundaries.

NEXT STEP

INTRODUCE ME TO **ONE HOA** THAT COULD USE THIS.

A short three-way conversation is enough to see whether there is a fit. After the introduction, I scope and work directly with the association.



A HELPFUL INTRODUCTION INCLUDES

- ✓ The HOA or community name
- ✓ An authorized board or HOA contact
- ✓ One update residents often miss
- ✓ The channels the HOA uses today
- ✓ The best way to make the introduction



**REPLY TO THE MESSAGE THAT DELIVERED THIS PACKET
AND INTRODUCE AUTOMATE WITH JAKE TO ONE HOA LEADER.**



Your company can stay informed if helpful,
but it does not need to purchase, own, or operate the system.

**YOU MAKE THE INTRODUCTION.
I BUILD, TRAIN, OR MANAGE FOR THAT HOA.**