



Everything the team needs to run its own skills

Onboarding hands Greystone's team the operating manual for its three agreed skills: what each pack does, who prepares and who approves, the weekly rhythm, the targets each output is measured against, how records are handled, and the governance calendar for the quarter. Nothing runs until this is agreed and the reviewers are named.

CLIENT

Greystone FM Group

APPROVED BY

D. Farrow, COO

GO-LIVE

1 April 2026 · weekly cadence

PREPARED BY

S. Okoro, Skills Lead

REFERENCE

BT0-GFM-ONB-001

STAGE

03 of 4 · Onboarding

Illustrative example: fictional project and parties.

3

Agreed skill packs

14

Live contracts covered

42

Sites under the Dispatch pack

1 Apr

Go-live, 2026

01

THE SKILLS

Three packs, run by the team

Greystone's agreed skills are grouped in three packs. The team runs each skill with its own records on a weekly cadence, under the review gates and operating targets in this pack. The catalogue positions these as packs 04, 05 and 06.

PACK	SCOPE	COVERS
Commercial Control Kit™	Variation capture, entitlement narratives, change event logs, notice tracking, aged WIP evidence	14 live contracts
Margin Cockpit™	Monthly margin snapshot, margin bridge, aged WIP tracker, invoice blocker taxonomy, QBR narrative	Portfolio-wide
The Dispatch Desk™	Call triage, priority mapping, dispatch-ready tickets, SLA evidence, morning handovers	42-site portfolio

THE SCOPE BOUNDARY

The agreed skills prepare structured, review-ready drafts. Greystone's named reviewers validate, approve and issue every output, and reliance remains with Greystone's competent people at all times. The skills accelerate the work; they do not remove competent review.

02

PEOPLE & CADENCE

Who runs it, who approves it, when

Named people run the skills, check the drafts, and approve and issue the outputs. The rhythm is a weekly skills cycle from Monday records to a Friday summary, feeding monthly governance and a quarterly review.

NAME	ROLE	RESPONSIBILITY
S. Okoro	Skills Lead	Weekly cycle, preparer checks, weekly summary and governance pack
M. Patel	Commercial Analyst	Runs the Commercial Control Kit and Margin Cockpit skills
R. Chen	Operations Analyst	Runs the Dispatch Desk skills and SLA evidence
K. Rhodes	Commercial Director	Approves and issues CCK and Cockpit outputs
T. Brennan	Head of FM Ops	Approves and issues Dispatch outputs and the daily handover
D. Farrow	Sponsor, COO	Approves and issues governance reports and the QBR
L. Osei	IT Manager	Environment accounts, user access and integration queries
J. Whitmore	Build Lead, BuiltAI	Skill build, testing, training and handover

DAY	ACTIVITY	OWNER
Monday	Records filed to the shared workspace; returned items reworked	Site teams and analysts
Tuesday	Required-input checks complete; analysts run the agreed skills	M. Patel, R. Chen
Wednesday	Preparer checks against the agreed templates and checks	S. Okoro
Thursday	Drafts to the named reviewers; evidence packs compiled	Analysts to reviewers
Friday 14:00	Weekly Delivery Summary issued; approved outputs filed	S. Okoro to leads

03

TARGETS & DATA

Operating targets and data handling

Greystone's internal targets for work prepared with the skills, measured weekly and reviewed quarterly. These are indicative baselines set at onboarding and recalibrated after the first 30-day operating period against measured actuals.

MEASURE	TARGET	PACK
Weekly on-time rate	95% or better	All packs
Output quality, approved without rework	90% or better	All packs
Variation narrative turnaround	48 hours or less	CCK
Monthly margin snapshot	By the third working day	Cockpit
Dispatch ticket processing	15 minutes or less	Dispatch
Morning handover	By 07:30	Dispatch
Governance report issue	First Monday, monthly	All packs

HOW RECORDS ARE HANDLED

Site and contract records are filed to Greystone's shared workspace through approved channels only. The skills run in Greystone's agreed Claude environment, configured at onboarding; only named Greystone users run them or approve outputs. Access is role-based, managed by L. Osei and reviewed monthly, and run logs are retained for 12 months. BuiltAI has no access to live records unless Greystone grants it for an agreed task.

04

ESCALATION & CALENDAR

Escalation routes and the governance calendar

Three escalation levels route an issue to the right owner. Operational items sit with the Skills Lead, process and skill-fault items step up to the pack reviewers, with skill faults raised to BuiltAI under the separately agreed support terms, and any data or access matter goes straight to the IT Manager and the sponsor.

LEVEL	TRIGGER	FIRST CONTACT	ESCALATES TO
L1, operational	Missed item, minor rework, input query	S. Okoro	K. Rhodes or T. Brennan
L2, process	Repeated quality issue, missed target, skill fault	S. Okoro	K. Rhodes or T. Brennan
L3, executive	Systemic failure, data incident, access matter	L. Osei	D. Farrow
DATE	EVENT	OUTPUT	
Apr, weekly	Weeks 1 to 4 Delivery Summaries	Weekly summary	
4 May	Month 1 Governance Review	Monthly report	
1 Jun	Month 2 Governance Review	Monthly report	
30 Jun	Q2 Quarterly Business Review	QBR pack and forward plan	

05

SUPPORT &
CHANGE

Support, change control and acceptance

How the engagement is supported after go-live and how any change is agreed. The three packs are a one-off build that Greystone runs in its own environment; anything new is quoted and approved before it is added, so scope never drifts without a decision.

CHANGE	ROUTE	APPROVES
New skill or pack	New use-case assessment, then written quote and build	D. Farrow
Scope change to a live skill	Written quote against the change, then build	D. Farrow
Template refinement	Logged and versioned where within the agreed scope	S. Okoro with reviewer
Target recalibration	After the first 30-day operating period, against actuals	D. Farrow
Skill fault or support incident	Raised to BuiltAI under the separately agreed support terms	S. Okoro to BuiltAI
User access change	Role-based access request, reviewed monthly	L. Osei

ACCEPTANCE AND THE FIRST 30 DAYS

The skills are accepted against the Statement of Work at onboarding. The first 30 days run as a settling period: the targets in section 03 are indicative baselines, recalibrated against measured actuals at the Month 1 Governance Review on 4 May 2026 before they are held as firm.