

# VOYAGER AI CASE STUDY

## AI in Family Offices Lease Management



### OVERVIEW

Our client is a prominent Hong Kong-based Family Office with a strategic focus on real estate investments. Like many private wealth entities, they operated with a lean team, relying on manual processes and spreadsheets to manage a growing property portfolio. As the portfolio expanded, the administrative burden of property management began to detract from their core focus of investment strategy.

### BUSINESS CHALLENGES

Data Fragmentation  
Tedious management  
Labor-Intensive Manual Reconciliation

### OBJECTIVES

#### AUTOMATE MULTI-CHANNEL COLLECTIONS & ESCALATION

Eliminate the manual effort of chasing rent by implementing an intelligent workflow that autonomously handles payment reminders across Email and WhatsApp, aiming to reduce administrative workload by over 80%.

#### REAL-TIME FINANCIAL VISIBILITY & RISK PRIORITIZATION

Replace static spreadsheets with dynamic financial tracking that instantly calculates outstanding balances against lease terms. The goal is to **shorten the rent collection cycle** and **identify "at-risk" accounts** immediately.

#### ENSURE 100% DATA SOVEREIGNTY

Integrate disparate datasets (customers, entities, contracts, payments) into an easy-to-use, secure, private infrastructure, deploying AI models locally without uploading any data to the cloud.

### SOLUTIONS IMPLEMENTED

#### UNIFIED CONTRACT & ASSET DATABASE

We migrated disparate physical files into Lexington's secure Buildings and Contracts Modules, eliminating errors associated with manual spreadsheet entry.

#### AUTOMATED MULTI-CHANNEL DUNNING ENGINE

We utilized Lexington's Reminder Templates to trigger lease-specific notifications via WhatsApp and Email without human intervention. Reduced manual communication efforts by **90%**, allowing the team to manage **5x more** units with the same headcount.

#### REAL-TIME RISK PRIORITIZATION DASHBOARD

We deployed a "Worst Aging Accounts", which instantly calculates the comparison between outstanding balances and contract history, and places them at the top of the dashboard.

### CONCLUSION

The deployment of **LEXINGTON** enabled our Family Office client to achieve a **90% reduction** in administrative overhead while **maintaining 100% data sovereignty**. Voyager AI proves that modern asset management can be both highly efficient and completely secure.



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