

## CASE STUDY

# AI in Action: Mountain Valley Streamlines A/P and Customer Support with HOAi

## THE CHALLENGE: MANUAL A/P AND TIME-HEAVY COMMUNICATION

Mountain Valley Property Management, a boutique firm managing 30+ associations in Colorado, set out to optimize its accounts payable and homeowner communication processes. With a lean team managing a growing workload, CEO Alex Cudney looked for a more efficient, accurate, and scalable solution to streamline operations, free up staff time, and support long-term growth.



**Alex Cudney,**  
CEO, Mountain Valley  
Property Management

“We were spending 40 hours a month just coding invoices—and we’re not a very big company,” said Alex. “For larger companies, it’s going to be incredibly helpful.”

## HOAi FOR ACCOUNTS PAYABLE: AUTOMATING TIME-INTENSIVE TASKS

Mountain Valley Property Management recently implemented HOAi’s Accounts Payable agent to streamline what had been a highly manual process. Previously, their offshore team member was responsible for coding and processing invoices—an error-prone and time-consuming task due to limited context on U.S. HOAs. HOAi’s A/P agent changed that overnight. By analyzing historical transaction data, the agent now automates invoice coding based on previous patterns, dramatically reducing the manual burden on staff.

**“Now, instead of taking 40 hours a month, it’ll be closer to 10,” Alex shared.**

With a small team managing over 30 associations, this shift has freed up valuable hours that are now spent on more strategic, high-value work. Mountain Valley no longer needs to allocate significant time to repetitive A/P tasks—HOAi handles it with speed, accuracy, and contextual understanding.

## HOAi FOR SUPPORT & RESEARCH: DELIVERING FAST, RELIABLE ANSWERS

Beyond invoice automation, Mountain Valley had already adopted HOAi's support and research workflows to enhance communication with homeowners and boards. These AI-powered agents quickly surface relevant information from governing documents, communications history, and uploaded files, helping staff craft accurate, well-researched replies in a fraction of the time.

In one standout case, a board member requested detailed information about insurance renewals. HOAi instantly pulled historical data, created a line-by-line policy comparison, and proposed a draft response.

**"It gave a well-researched answer that would've taken an assistant manager an hour—if they could get to that level of detail at all."**

With HOAi, staff no longer need to start from scratch when responding to inquiries. The platform provides a clear, editable starting point—saving time, boosting professionalism, and improving resident satisfaction.

## ENHANCED TEAM CONFIDENCE AND GROWTH READINESS

The real game-changer for Alex was HOAi's role in preparing his team for scale. Preparing for an acquisition that will double their portfolio, Alex now has the confidence to grow without immediately expanding staff.

**"Before, we wouldn't consider onboarding 30 associations at once. Now, we can." HOAi's ease of use also makes onboarding new employees and acquired teams faster and less technical. "HOAi is intuitive, and chat based. You don't need deep software experience to be productive."**

## A “DEEP DIVE” INTO OPERATIONS

HOAi didn't just streamline tasks, it prompted a deeper operational review. From financial reviews to document organization, the platform forced the team to revisit, clean up, and improve their processes to fully capitalize on the AI's capabilities. “It's forced us to take deep dives into how we manage communities, our documents, and our financials.”

For Mountain Valley, the value of HOAi goes far beyond automation; it's a strategic enabler for smarter operations. By eliminating repetitive tasks, empowering team members with AI-powered tools, and improving response times for customers and boards, HOAi has become essential to how the company operates and plans for the future. With growth on the horizon, HOAi gives the team confidence to take on more without sacrificing service quality or overextending staff.

“It's not just about cost savings. It's about giving our team better things to do with their time,” Alex said.

**“HOAi is going to revolutionize this industry—and it already is.”**

