

AI Leasing Assistant — Conversation & Escalation Flow

Representative decision flow for supported renter intents, clarification, context use, escalation and failure handling | Portfolio Sample — Reconstructed & Anonymized

1. Core conversation decision flow

Renter message	1. Identify intent	2. Check context	3. Decide path	4. Respond / act	5. Continue or hand off
Incoming message New question, follow-up, request for action, or explicit request for a person.	Supported? Classify against defined renter intents and boundaries. If ambiguous → clarification path.	Enough approved information? Use relevant active-conversation and property/unit context. Do not fill gaps by guessing.	Choose one: Answer Ask clarification Perform supported action Escalate	Grounded response or Action outcome Do not claim an action succeeded until the system outcome supports it.	Continue if the renter has a supported next need. Hand off when boundary or escalation rule is met.

2. Path rules

Path	Trigger	Expected assistant behaviour	Exit / next step
A — Answer	Intent is supported and required approved context is available.	Answer using available context. Do not add unverified property, unit, price, policy or availability details.	Continue conversation.
B — Clarify	Message could reasonably map to materially different intents, or a required value is unclear.	Ask one targeted question needed to select the correct path. Reuse information already provided.	Return to intent/context decision.
C — Supported action	Intent maps to an action the product can perform and required inputs are available.	Initiate the action and use the actual integration outcome before confirming success.	Continue if successful; failure path if not.
D — Escalate	Human requested, unsupported/sensitive intent, repeated misunderstanding, or rule requires human judgment.	Stop autonomous handling, acknowledge handoff and preserve useful conversation context.	Human/support channel.
E — Safe fallback	Required information or action is unavailable but immediate human handoff is not required.	State the limitation and provide the approved alternate path. Do not fabricate an answer or success state.	Continue or escalate based on renter response.

3. Escalation decision

Trigger detected	Assistant should NOT	Assistant SHOULD	Context passed to handoff
Renter explicitly asks for a person	Keep answering in an attempt to retain the conversation.	Acknowledge and start the supported handoff.	Conversation summary + relevant renter/property context where permitted.
Unsupported or sensitive request	Invent a policy answer or improvise outside the approved boundary.	Use approved boundary language and escalate.	Original request + relevant prior context.
Repeated clarification fails	Ask essentially the same question indefinitely.	Stop at the agreed threshold and offer/trigger handoff.	Clarifications already attempted + known values.
Action/integration fails	Say the tour/request/action was completed.	Communicate failure or approved fallback based on actual outcome.	Attempted action + failure context/reference where available.

4. Example conversation state progression

Turn	Renter / event	State / BA interpretation	Next behaviour
1	"Do you have anything available?"	Supported topic, but request lacks enough context to identify unit/location/date needs.	Ask targeted clarification.
2	Renter provides property and timing preference.	Required context now available for the supported lookup/action path.	Use confirmed context; do not ask again.
3	Renter asks a separate policy exception question.	New intent; falls outside autonomous decision boundary.	Escalate policy question rather than inventing an exception.
4	Handoff initiated.	Conversation already contains property, timing and policy question.	Pass useful context so renter does not restart from zero.

BA focus: the important requirement is not simply "AI answers renter questions." The flow needs explicit boundaries around supported intent, context sufficiency, clarification, action confirmation, loop prevention and human handoff.