

BOSTON AUTOMATIONS

Miami Estate Technology Walkthrough

Strategic Briefing Document

2901 Flamingo Drive, Miami Beach, FL | Monday, March 23, 2026 | Prepared for Adam Zell

1. PROJECT OVERVIEW

Boston Automations has been engaged by The RMR Group to consult on a full smart home technology upgrade for a waterfront estate at 2901 Flamingo Drive, Miami Beach. The property is held in an LLC and managed by RMR on behalf of the client, a CEO who also maintains a primary residence in the Boston area.

The client already runs Control4 in his Boston home and wants the same simplified experience in Miami. The property currently suffers from a fragmented technology environment — approximately 11 separate apps for basic functions — inherited from the previous owner. The client’s goal is simple: one app, one experience, everything works.

Key Facts

- **Family:** 5 members. Family plans to move in by August 2026; daughter starts school in September.
- **Budget:** Not yet discussed. The client told Bridget to figure out what’s needed first. Expect a phased approach conversation.
- **Scope:** AV/IT only. The client explicitly rejected extending the RMR corporate network to this property.
- **Timeline:** Work backward from August move-in. Critical path items must be identified during this visit.
- **Top priority:** Music and audio. Listening to music is the single most important thing to this client. The audio replacement plan after Sonos removal must be compelling.

2. KEY PEOPLE

Name	Role	Contact	Notes
Bridget Cahill	Senior Property Manager, RMR	C: 617-586-6246 BCAHILL@rmrgroup.com	Your primary point of contact and champion. She pushed for BA to get this opportunity. Make her look good.
Joseph Freni	Team Lead, Exec IT Support, RMR	T: 617-796-8374 JFRENI@rmrgroup.com	Original intake contact. Initiated the engagement. May not be onsite but knows the history.

Name	Role	Contact	Notes
Larry Solis	RMR Engineer (onsite)	C: 954-253-1642	Lives ~50 mi north, arrives 7:00–7:30 AM. Your first contact at the property. Call to confirm early arrival.
Derek	RMR Engineer	TBD	May have onboarding conflict. Confirm attendance.
Matthew Roller	B Digital (local AV partner)	Coordinating via Adam	Arriving with you at 8:30 AM. Vetted through Cinergy group (Bob Melnik, 25+ yrs). Same-day local support partner.
The Client	Property Owner / CEO	Via Bridget only	Arriving ~10:30 AM. Already has Control4 in Boston home. Do NOT reference by name externally.
Frank	Able Controls (Boston C4 vendor)	You've spoken directly	Currently doing a job together. Completely fine with BA in Miami. Communicate naturally if it comes up.

3. DAY-OF SCHEDULE

- **7:00–7:30 AM** Larry Solis arrives at property. Call to confirm.
- **8:30 AM** Adam Zell + Matthew Roller arrive. Begin early walkthrough. Document ALL tech: photograph every piece of equipment, racks front and back, wiring, model numbers.
- **9:00 AM** Bridget Cahill arrives. Brief her on early findings. Align on talking points before the client.
- **10:00–10:30 AM** The client arrives. Let him lead. Listen first, advise second. Be ready by 10:00 AM — he may arrive early.
- **~12:00–1:00 PM** Wrap walkthrough. Confirm next steps with Bridget. Exchange contact info.
- **By 2:00 PM** Must be off property (standard access protocol — confirm if this applies).

4. CURRENT STATE OF THE PROPERTY

The estate’s technology is a fragmented patchwork from previous owners. The client describes the home as “too smart” — not because it does too much, but because nothing works together. Understanding and documenting this mess is the primary goal of the early walkthrough.

What’s There Now

- **Audio:** 10+ Sonos rack-mount units. Bulky, likely obsolete. The client does NOT want Sonos. All getting removed. This is the biggest replacement conversation — have a strong in-ceiling speaker + C4 audio distribution plan ready.
- **Control:** Old in-wall iPads logged into previous owner’s accounts. No passwords. Live power. Client wants ALL removed. Wall patching needed afterward — this unblocks their painting contractor.

- **Security:** New ADT perimeter cameras (significant recent investment). These MUST stay. C4 can display camera feeds and alarm status in the same app.
- **Intercom:** Ring doorbell at front door — currently non-functional. Client may want working intercom for packages.
- **Projector:** Main living/media room. Very old, doesn't work, bad glare from waterfront. Client loves projectors. Also discuss video wall option — we are actively sourcing a Just Video Wall (JVW) for this property.
- **Network:** BreezeLine ISP (only option — no Comcast or Verizon). Eero mesh extenders from previous owner. Consumer-grade, working but need to be replaced with enterprise.
- **HVAC:** Lux / Linux Home app thermostats. Unknown C4 compatibility. May need replacement.
- **Gates/Garage:** Separate apps for each. Gate uses phone app, garage is MyQ. Goal: consolidate into C4.
- **Shades:** Wife wanted to wait for AV company before deciding on window treatments. Opportunity for Lutron motorized shades.
- **Pool:** Separate app for chemicals, lighting, temperature. Explore C4 integration.

Biggest Unknowns

- Wiring — is it labeled? Can you trace runs? This was flagged as the biggest unknown in January.
- Cable/ethernet runs to each room — what's wired vs. wireless?
- UPS / battery backup — is there any? Should there be?
- Speaker infrastructure — any in-ceiling or in-wall speakers beyond the Sonos rack?
- Guest house tech state — previous owner used as conference room.

5. STRATEGIC APPROACH

The pitch is simple: one app, hotel experience, everything works. The client is not a technology enthusiast — he's a busy CEO who is fed up with complicated tech. Lead with benefits, give tech details only if asked.

Core Talking Points

- **'One app' vision — Control4 for everything** Gate, garage, alarm status, HVAC, pool, music, shades, lighting — all in one app he already knows from his Boston home.
- **Multi-property switching** Same C4 app, tap to switch between Boston and Miami. Huge selling point — familiar interface across all properties.
- **Josh.ai voice control** He uses voice commands at home (possibly Siri/Alexa). Josh.ai on C4 is far superior — speaks naturally, knows which room you're in. Demo your 'goodnight' command.
- **Audio replacement plan** This is the #1 priority. Sonos rack is going. Replace with in-ceiling speakers + C4 audio distribution. Have a clear zone map and streaming service plan. Make this compelling.
- **Video wall option** We are sourcing a Just Video Wall for this property. Present alongside projector replacement as a modern, glare-free alternative. Let the client choose.

- **Simplification philosophy — ‘hotel experience’** Show up, everything works. Minimal interaction required. This is what he wants to hear.
- **Network upgrade — enterprise-grade, monitored, no reboots** Replace Eero. Add Starlink as backup ISP. His Boston home has 4 lines of redundancy — give similar confidence here.
- **Lutron motorized shades** Wife was waiting for AV company input. This is a decision-ready opportunity.
- **iPad removal plan** Confirm which ones go, discuss wall patching. This unblocks their painting/patching contractor. Give clear yes/no decisions.
- **ADT / security stays** He spent significant money on new cameras. Confirm they stay. C4 can show camera feeds and alarm status in the same app.
- **Matthew Roller / B Digital as local support** Vetted through Cinergy group. 25+ yrs experience. Same-day local response. One throat to choke — they call you, you coordinate.
- **Timeline — family moves in August, daughter starts school September** Work backward from August deadline. Identify critical path today.

Things to Avoid

- Do NOT recommend internal cameras. He does his own (Google Nest) for privacy reasons.
- Do NOT bring up Savant unless the client does. Your recommendation is Control4 (matches Boston home). If asked, have a confident answer: C4 is the right choice for multi-property consistency.
- Do NOT get in the weeds. Give him the benefit first, tech details only if asked.
- Do NOT reference the client by name externally. Always ‘the client’ or ‘the property.’

Questions to Ask the Client

- What are the three things that frustrate you most about this house right now?
- When you walk in the front door, what do you want to happen automatically?
- How often will you be here vs. your family full-time?
- Are there rooms you want fully set up first for priority use?
- Do you want to replicate anything specific from your Boston setup?
- What does your family listen to? Streaming services, zones, volume levels?
- Any interest in landscape / outdoor lighting upgrades?
- Comfort level with a phased approach vs. doing everything at once?
- Guest house — keep the conference room setup? Add projector/display + conferencing?

6. ACCESS PROTOCOL & REMINDERS

- **Confidentiality:** Property is held in an LLC. Do not reference the client by name externally.
- **Access:** RMR escort required at all times for any vendor. No entry before 10 AM without pre-clearance (you have early access via Larry). Must be gone by 2 PM on normal days — confirm if this applies tomorrow.

■ **Frank / Able Controls:** You've spoken with Frank directly. He's completely fine with this. You're doing a job together currently. If Bridget or the client brings it up, communicate this naturally.

■ **Equipment to bring:** iPad/tablet for notes and photos, this printed checklist, phone fully charged, flashlight for server closet, measuring tape, notepad/voice recorder, business cards for Bridget, Larry, and the client.

7. POST-VISIT DELIVERABLES

- Full technology assessment report — inventory of all existing equipment with age/condition
- Recommended system design — Control4, networking, audio, video, shades, voice
- Phased project plan with timeline working back from August move-in
- Budget proposal with tiered options if appropriate
- Support plan recommendation — which tier, local partner responsibilities
- Equipment lifecycle and warranty tracking dashboard setup
- Coordinate with Frank on Boston C4 system details for multi-property integration