

BOSTON AUTOMATIONS

Miami Estate Technology Walkthrough

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

1. PRE-ARRIVAL PREPARATION

Logistics & Contacts

- Confirm flight details and ground transportation to property
- Contact Larry Solis — confirm early arrival (7:00–7:30 AM)
Cell: 954-253-1642. He lives ~50 mi north, arrives early to beat traffic.
- Contact Matthew Roller (B Digital) — confirm 8:30 AM arrival together
- Bridget Cahill arriving ~9:00 AM; the client arriving ~10:00–10:30 AM
Be ready by 10:00 AM. Bridget's cell: 617-586-6246.
- Confirm Derek's attendance (he may have onboarding conflict)

Equipment to Bring

- iPad / tablet for notes and photos during walkthrough
- This printed checklist (PDF)
- Phone fully charged — camera for documenting all equipment
- Flashlight for server closet / dark utility areas
- Measuring tape (for rack dimensions, iPad cutout sizes, projector throw, video wall space)
- Notepad / voice recorder for the client's specific requests
- Business cards for Bridget, Larry, and the client

Key Reminders

Confidentiality: Property is held in an LLC. Do not reference the client by name externally. Refer to 'the client' or 'the property.'

Access protocol: 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.

Relationship with 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.

2. EARLY WALKTHROUGH — Before the Client Arrives (8:30–10:30 AM)

Goal: Document every piece of technology in the house. Photograph everything. Understand wiring, rack layout, and current system state so you can speak confidently when the client arrives.

Exterior & Entry

- Gate system — identify make/model, app used, wiring to intercom

Currently uses a separate phone app. Can this integrate into Control4?

- Garage door — identify MyQ model and controller

Separate app from gate. Goal: consolidate into single platform.

- Perimeter cameras — document ADT camera locations and model numbers

These are NEW and must stay. Significant recent investment.

- Ring doorbell / intercom at front door — currently non-functional

Document model. The client may want a working intercom for packages.

- Driveway / landscaping lighting — any smart lighting outdoors?

- Entry locks and smart lock hardware on all exterior doors

Entire downstairs is glass doors, all tied to ADT. The client doesn't love current locks.

Server Closet / Equipment Rack(s)

- Photograph ALL rack equipment — front and back, every shelf

- Count racks (Bridget said 1–2)

- Document Sonos equipment — count units, model numbers, age

10+ Sonos rack units. The client does NOT want this. Likely all getting removed. Audio is his #1 priority — have the replacement plan ready.

- Document network equipment — switches, routers, access points

- BreezeLine modem/router — model and connection type

This is the ISP. Cannot get Comcast or Verizon at this address.

- Eero mesh extenders — count and locations throughout house

Left by previous owner. Working but consumer-grade. Plan to replace with enterprise.

- Check wiring — is it labeled? Can you trace runs?

This is the biggest unknown per your January call. Label what you can.

- UPS / battery backup — is there any? Should there be?

- Document any existing Control4 hardware (unlikely but check)

- Check for cable/ethernet runs to each room — note what's wired vs. wireless

Interior — Room by Room

- iPads in walls — count, locations, sizes, and condition

Old, logged into previous owner. No passwords. The client wants ALL removed. Note wall damage that will need patching.

- Lighting controls — identify switch types in each room

Are they smart switches? Standard toggles? Dimmers? What brand?

- HVAC controls — identify the 'Lux' / Linux Home app thermostats

Can these integrate with Control4? Or do they need to be replaced?

- Speakers — any in-ceiling or in-wall speakers beyond the Sonos rack?

The client's #1 priority is music. What infrastructure exists for speakers? Document everything.

- Projector (main living/media room) — document make, model, mount type

Very old, doesn't work well, glare from waterfront. He'll want replacement. Also discuss video wall option — we are actively sourcing a JVV.

- TVs — any existing? Locations? Bathroom TVs mentioned in Aug call

- Window treatments / shades — motorized? Manual? Brand?

Wife wanted to wait for AV company before changing. Opportunity for Lutron shades.

- Safe — mentioned in connection with alarm system. Location and access?

Pool, Outdoor & Guest House

- Pool controls — document current app, equipment model, and integration options

Separate app for chemicals, lighting, temperature. Can it integrate into C4?

- Pool iPad — one mentioned by the pool area. Document and mark for removal.

- Outdoor audio — any existing speakers or wiring for outdoor sound?

Music is the top priority. Outdoor zones matter.

- Guest house — walk entire space, document all tech

Previous owner used as conference room. The client may want to keep that. Has bedroom too. Potential for projector/display + conferencing setup.

- Outdoor lighting — smart or manual? Landscape lighting controls?

- Hot tub / spa — any separate controls or apps?

Networking Assessment

- Test current internet speed (BreezeLine) from multiple locations

- Document all Eero access point locations

- Assess Wi-Fi dead zones or weak coverage areas

- Check for hardwired ethernet drops in each room

- Note roof access / mounting points for Starlink dish

Recommend Starlink as backup ISP. Trending in this market — proactive suggestion.

- Evaluate best locations for enterprise-grade access points

Replace Eero with monitored, commercial-grade networking. No reboots philosophy.

3. CEO WALKTHROUGH — With the Client (10:30 AM+)

Approach: Let the client lead. He's particular and will tell you what he wants and doesn't want. Listen first, advise second. Value his time. Don't get in the weeds. Give him the benefit first, tech details only if asked. He's a normal, approachable guy — but he's a busy CEO who's fed up with complicated tech.

Key Talking Points to Cover

- Introduce the '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 his properties.

- Josh.ai voice control recommendation

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 plan — the #1 priority

Sonos rack is going. Present a clear replacement: in-ceiling speakers with C4 audio distribution, zone map, streaming service integration. This is what matters most to him.

- iPad removal plan — confirm which ones go, discuss wall patching

This unblocks their painting/patching contractor. Give clear yes/no decisions.

- Projector + video wall discussion — get his vision for the media space

He loves projectors. Also introduce video wall tiles as a modern, glare-free alternative. We are actively sourcing a JVW. Let him choose.

- Simplification philosophy — 'hotel experience'

Show up, everything works. Minimal interaction required. This is what he wants to hear.

- Introduce Matthew Roller / B Digital as local support partner

Vetted through Cinergy group. 25+ yrs experience (Bob Melnik). Same-day local response. One throat to choke — they call you, you coordinate.

- ADT / security system — confirm it stays, discuss integration into C4

He spent significant money. These stay. C4 can show camera feeds and alarm status in same app.

- Network upgrade — enterprise-grade, monitored, no reboots

Replace Eero. Add Starlink backup. His Boston home has 4 lines of redundancy — give similar confidence here.

- Discuss shades / blinds — Lutron motorized shades opportunity

Wife was waiting for AV company's input before making decisions on window treatments.

- Guest house — ask about conference room use case and requirements

- Internal cameras — do NOT recommend. He does his own (Google Nest) for privacy.

- Discuss timeline — family moving in by August, daughter starts school September

Work backward from August deadline. What's the critical path?

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? Zones, streaming services, volume levels?
- Any interest in landscape / outdoor lighting upgrades?
- Comfort level with a phased approach vs. doing everything at once?

4. POST-WALKTHROUGH — Before Leaving the Property

- Review all photos and notes — fill in any gaps while on-site
- Confirm next steps with Bridget — proposal timeline, follow-up call

She'll need to present something to the client. Give her a clear timeline for deliverables.

- Exchange contact info with Larry, Matthew, and anyone else present
- Discuss coordination with B Digital on proposal and local support model
- Note any items that need further research or follow-up

Unknown wiring, equipment that needs model lookups, integration compatibility questions.

- Thank everyone for their time

5. DELIVERABLES TO PREPARE AFTER THE VISIT

- 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

6. FIELD NOTES

Use this space for notes during the walkthrough:
