

Permit Intelligence System

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September 2026

Every single project starts with a permit. If we can speak to everyone who pulls a permit, we are talking to all of our customers and potential customers. Sales was, and will be, a relationship game. The sales team built relationships with architects who referred their clients to us, but that only captures a small subset of the people who will soon be building. So I built a sales generation tool to reach out to everyone who will need a contractor in the very near future. Permits are in some ways the only variable every project has. Our list produces people who will be building homes, ADUs, additions, and multi-family, and every one of them has a building permit from the local jurisdiction.

The August 2026 cycle loaded 1,068 records. That's a count of records, not customers, bids, or revenue.

Where the records come from

Production runs on one jurisdiction's open-data permit feed, a rolling 90 days of issued permits and permits in review. A county portal for the unincorporated areas is proven but not in the production cycle yet, and a ten-jurisdiction expansion sits in dry-run data, separate from the live list.

The refresh runs every other Monday. Weekly was more noise than outreach could absorb, and monthly let leads cool. Each refresh is an explicitly authorized cycle that writes to a dated folder. The pull never grabs the newest file by modification time, because that's how a stale file becomes this week's list.

Sorting them

We looked at what data was available and what data we needed to decide who to reach out to first. Permits get sorted by their building-code categories, not by keyword matching, into six categories: custom single-family, new multi-family, multi-family adding units, remodels or additions adding units, major remodels and additions, and ADUs. A parcel with several permits lands in the category that matters most to us, so a small secondary permit never hides the real project. A valuation floor applies only to the remodel category; everything else passes through, including permits with no valuation yet.

A few derived fields ride along. Permit Progress snapshots the jurisdiction's status of the parcel's highest-valuation permit as of the pull. Unit counts add dwelling units, ADUs, and junior ADUs together, because counting dwelling units alone misses the ADU-bonus stacks. Multi-family projects get a size fit against the unit counts we actually build, so a tower doesn't sit next to a fourplex on the call list.

Who's behind the permit

Each owner gets a persona: architect or engineer, trust or estate, builder, owner-occupied entity, developer or investor, homeowner, or unknown. Whether we treat a parcel as owner-occupied or investor-held comes from whether the mailing address matches the site, never from the raw assessor flag.

I also added a research leg so we gather useful information about potential developer and multi-family clients. Business entities get a public-records pass, never a personal profile: operator type, who's behind it, their portfolio, how long they've been active, and a suggested angle. Individuals and family trusts are classified as core residential without any web profiling. Where one operator holds several entities at the same address, the cluster is flagged so the team reaches them once.

Screening

A little bit of caution and a little bit of conviction. We want to respect people's wishes, so we don't hit the Do Not Call list with a sales call. Every list is scrubbed against the national registry, a litigator list, and our own suppression flag before it goes to sales. Mobile numbers are manual-dial only. No cold texts go to a skip-traced number, because a skip trace isn't consent. Opt-outs are honored immediately.

Contact information comes from a skip-trace vendor, and the return is validated against the batch we sent before any of it is used. After screening, each record lands in a call lane, a mail lane, or a hold lane. The categories most likely to need us go to calls. The rest go mail-first, with a hot subset pulled out for calls.

Loading the list

The working list lives in Airtable. Each cycle loads by upsert on a key built from jurisdiction plus permit number, ten rows at a time, with type coercion off so a bad value fails instead of silently converting. On records that already exist, the load leaves alone every field the sales team writes: assignments, attempts, notes, outcomes, and follow-up dates. The permit facts update underneath their work. That just makes sense; nobody wants to reconstruct a conversation because a spreadsheet refreshed.

The default mode is a dry run, and a dry run still does an authenticated read against the live base. Writing takes an explicit flag. Before any load, every key has to be present and unique and the count has to match what the cycle expected. After a live load, the affected records are read back to verify what changed and what was preserved. Backfills check their keys against existing keys first, because an unguarded run once created 32 stub records that had to be removed by hand.

The 60-day rule

In our experience most people will have found a contractor, or their pool of contractors, within 60 days of the permit. We want the people who are actively looking. So a lead cycles off 60 days after issuance, or immediately if the permit is cancelled or closed, unless sales is working it: reached, appointment set, bid sent, or won. Nothing is deleted. A cycled-off record keeps its call history and its suppression status, so if the same owner pulls another permit next year the team isn't starting cold, and a number that asked not to be called stays that way.

The record

Field group	What it holds
Permit facts	Permit ID, jurisdiction, site address, permit type, valuation, scope description, units and their source, submittal and issue dates, permit progress, pull date
Owner and contact	Owner, persona, operator type, mailing address, best callable phone, phone status, email, website, and where each of those came from
Screening	DNC status and scrub date, litigator flag, internal suppression flag, skip-trace status, outreach lane

Field group	What it holds
Sales working fields	Pipeline stage, assigned to, attempts, last contact, next follow-up, notes, outcome, angle
Lifecycle	First added, active since, lead lifecycle, size fit

Why build it

There are systems out there that will do this for you. I was able to build it myself, save us thousands of dollars every year, and get exactly the information we need. This system hasn't changed nearly as much as the estimating system. It's a simple data extraction and organization system, and it works.

A public permit is an early signal that someone is building, not permission to contact them. The screening rules run before any outreach, and the sales team decides who to call and how.