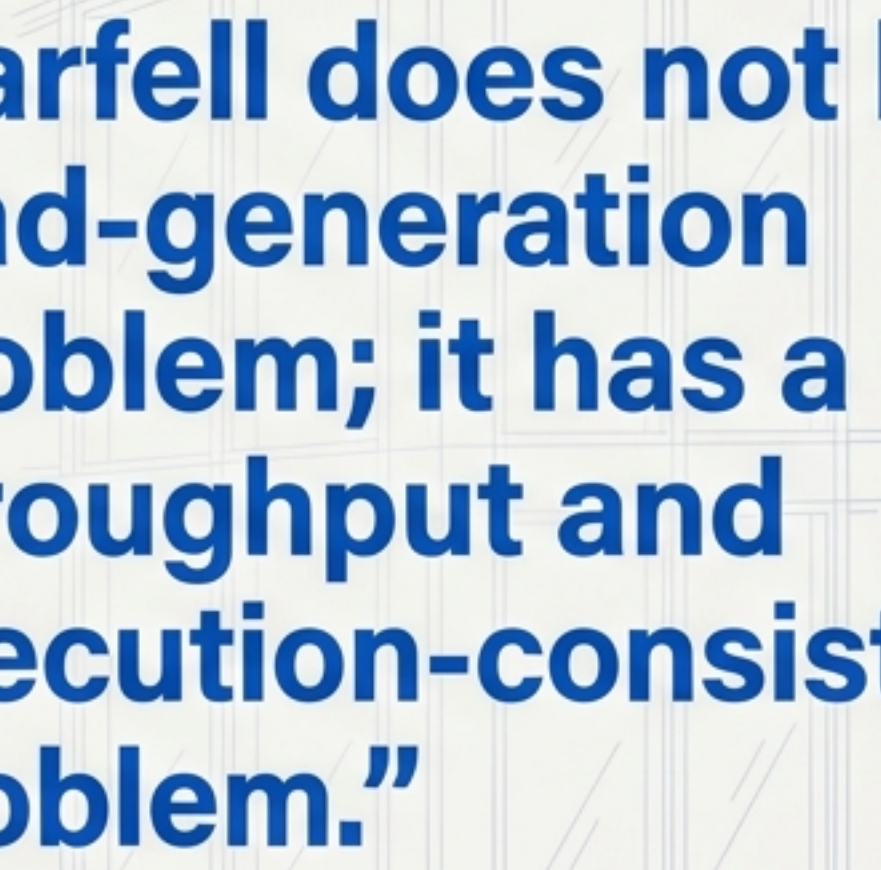


Strategic Blueprint for AI-Driven Operations

Unlocking Estimating Throughput and
Operational Clarity for Starfell Glass

Solving for Throughput and Execution Consistency



“Starfell does not have a lead-generation problem; it has a throughput and execution-consistency problem.”

Increase Bid Coverage

Reduce estimator first-pass review time without immediately adding headcount.

Standardize Handoffs

Improve transitions from estimator to PM to superintendent; encourage earlier risk escalation.

Capture Tribal Knowledge

Shorten PM onboarding time by converting undocumented habits into searchable playbooks.

Operational Landscape and AI Readiness Snapshot

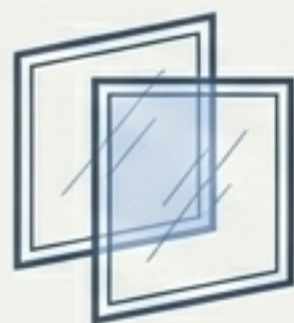
Business Profile



15-year commercial glazing fabricator (16-50 employees).



Hubs: Austin (Fabrication/Estimating/Install) & Dallas (Sales/Accounting/Install).



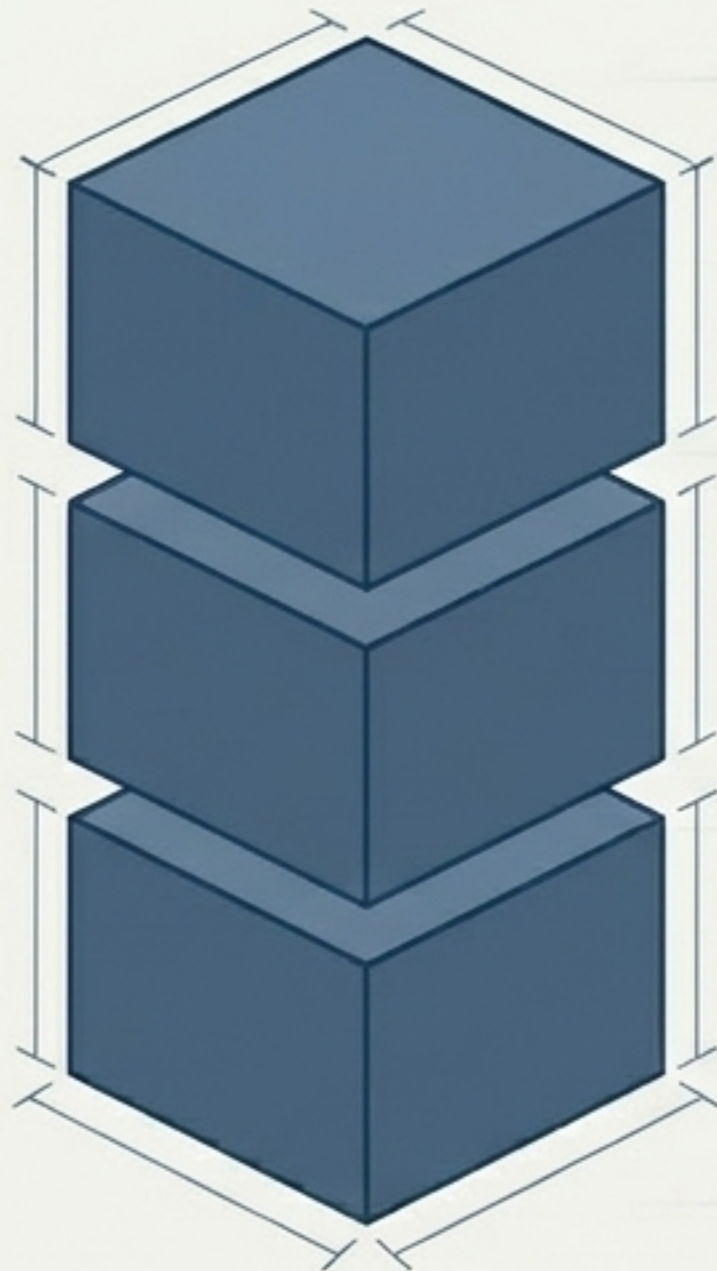
Digital Footprint: Microsoft 365, SharePoint, QBO, Workyard.

Readiness Diagnostic Matrix

	Digital Content Availability: Moderate (Work lives in digital files/emails)
	User Adoption Readiness: Moderate (Used to iPads/SharePoint)
	System Integration: Low-Mod (Little is connected today)
	Data Quality for Analytics: Low-Mod (Job costing not clean enough yet)
	Process Standardization: Low (SOPs are tribal knowledge)

Isolating the Operational Bottlenecks

What is Working

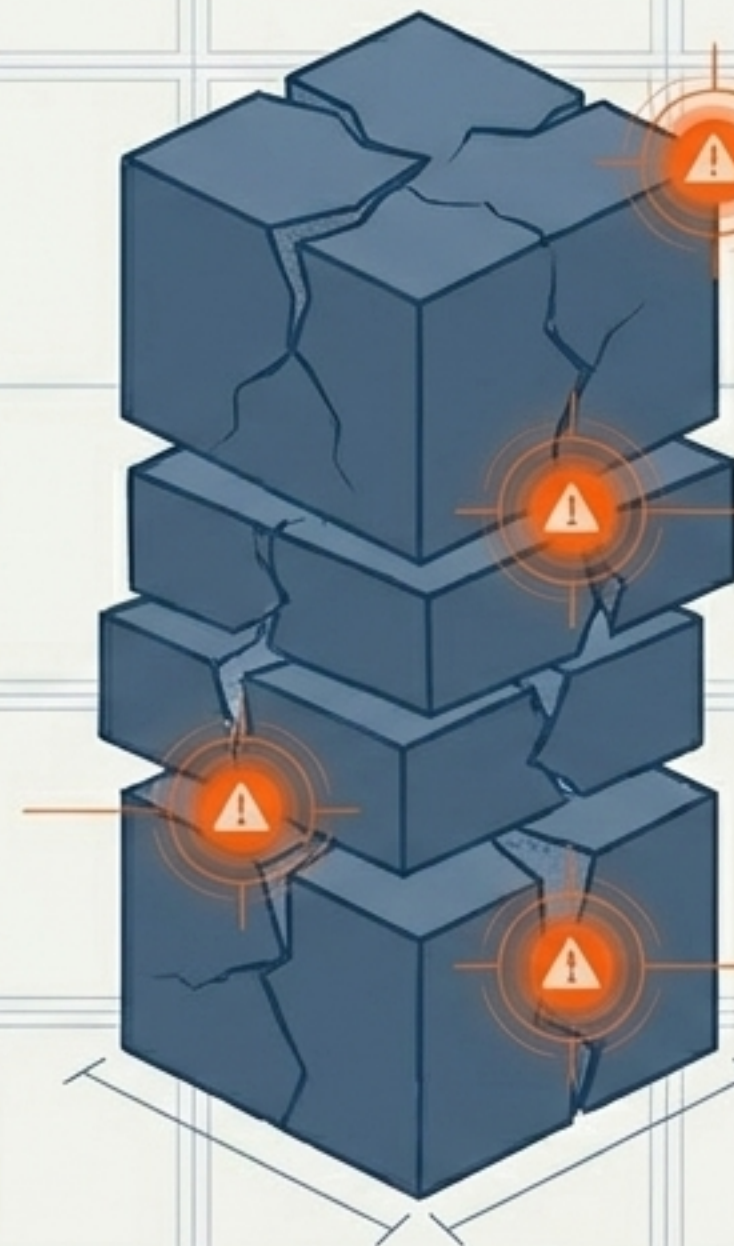


Reliable repeat-customer demand.

Existing Microsoft 365 footprint is a strong foundation.

Organization size is ideal for agile piloting.

What is Fragile

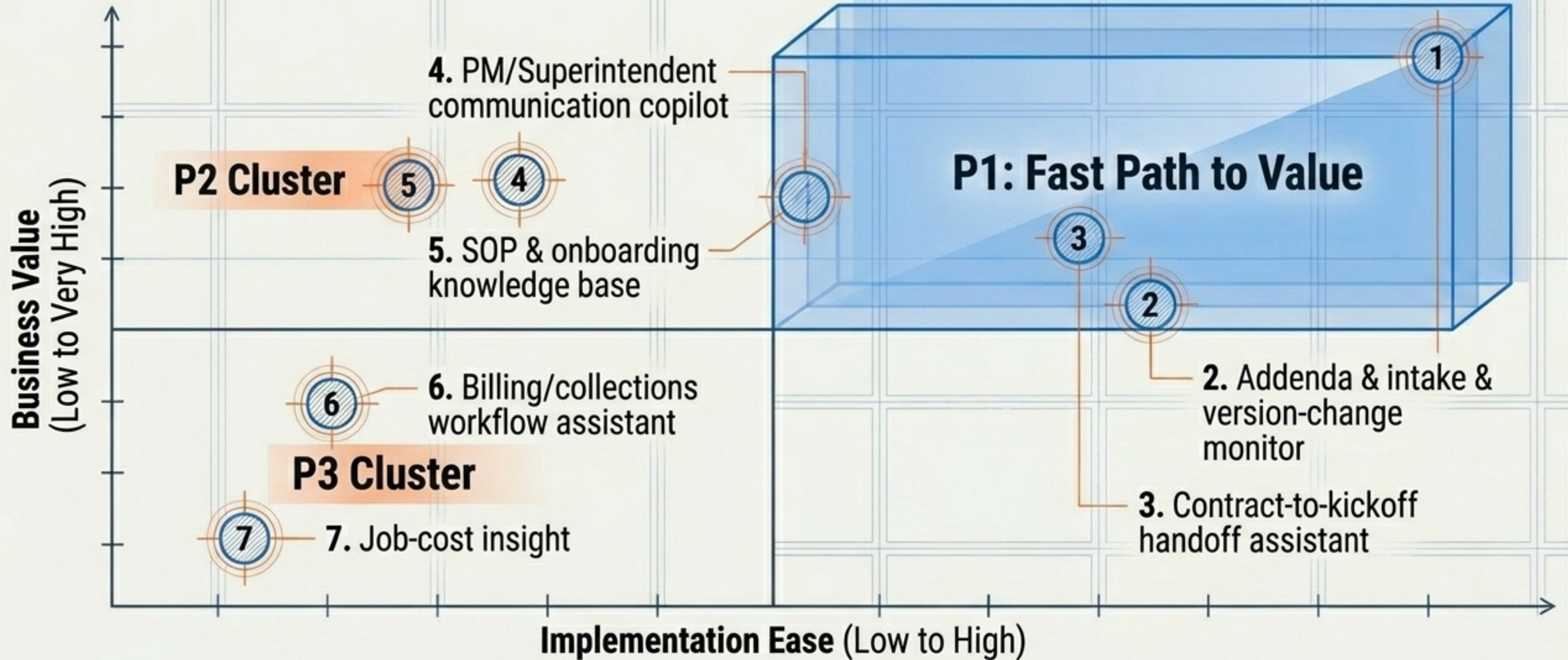


Estimating Capacity: The absolute main limiter on growth; cannot bid all invites.

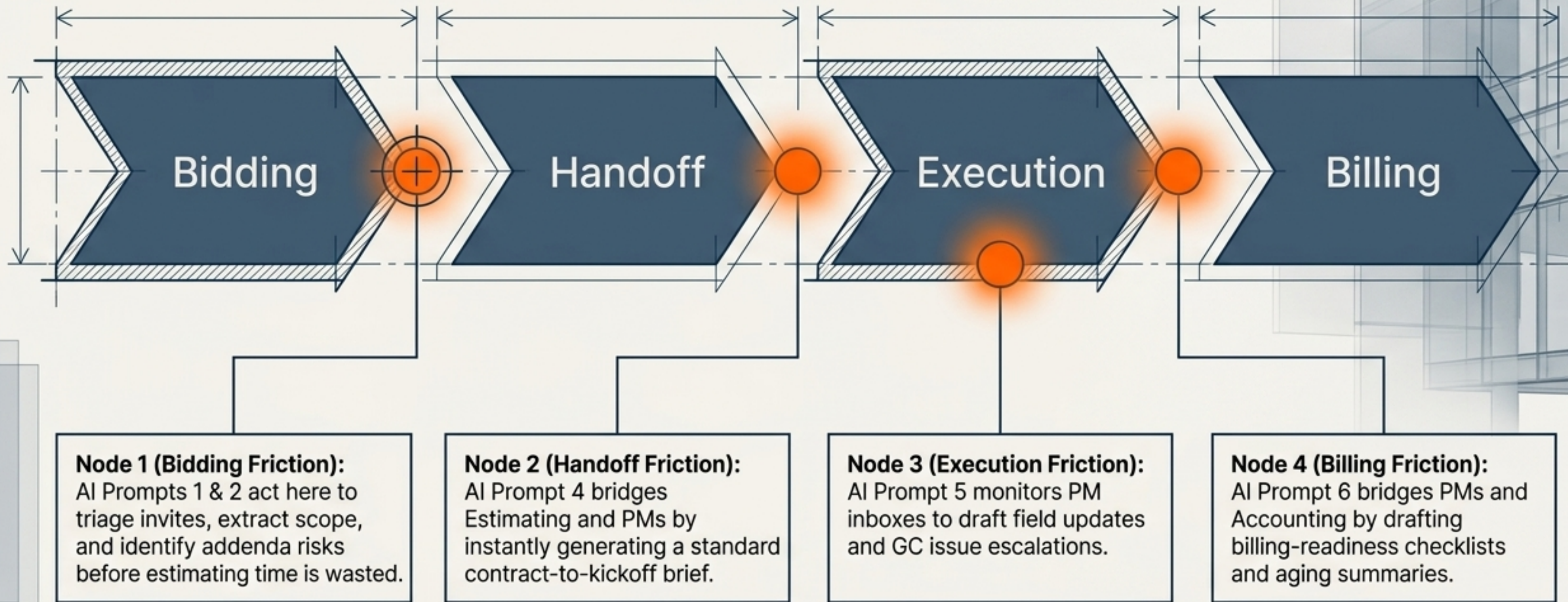
Tribal Knowledge: Heavy reliance on memory and undocumented SOPs slows onboarding.

Fragile Communication: Handoffs and project-critical details get buried in email or delayed.

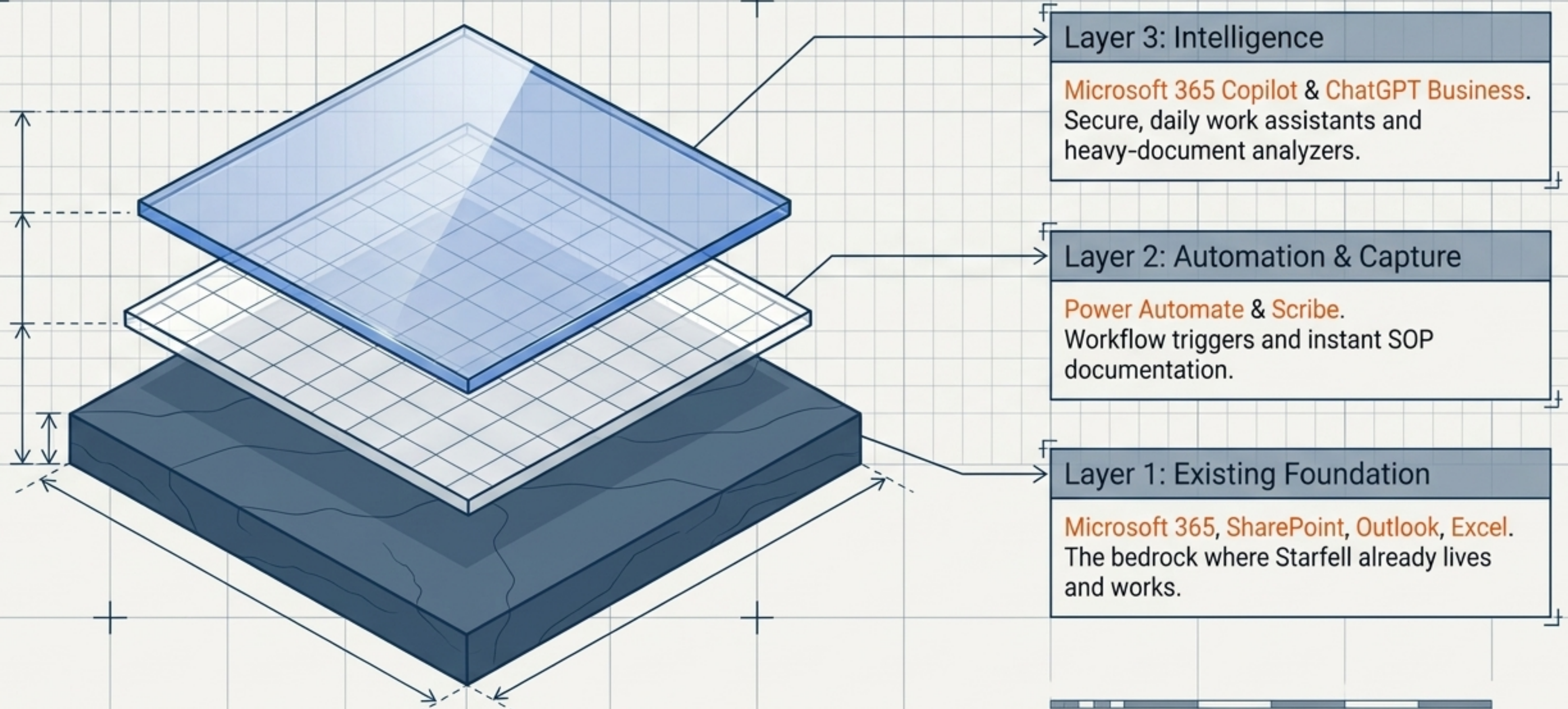
Prioritizing AI Interventions for Speed and Impact



The Bid-to-Bill AI Operations Lifecycle



Constructing the Tech Stack: The Layered Approach



Selecting the Right Intelligence Engines

Microsoft 365 Copilot

ChatGPT Business

Category

Daily AI productivity assistant

Secure AI workspace for complex document analysis

Best For

Scattered communication, email thread summaries, weekly PM summaries, meeting recaps

First-pass analysis of large bid packages, addenda comparisons, shared team prompt libraries

Data Boundary

Operates strictly within your internal Office 365 tenant

Secure team workspace isolated from consumer training models

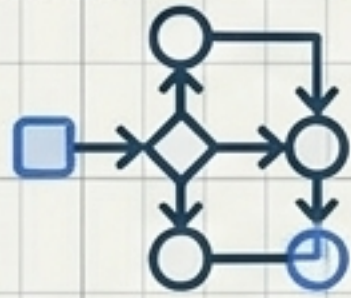
Estimated Cost

~\$30/user/month

~\$25-30/user/month



Automating Workflows and Capturing Tribal Knowledge



Power Automate Premium

(~\$15/user/month for builders)

- Native to the existing MS environment.
- Automates manual inbox monitoring, bid invite intake flows, and recurring monthly billing reminders.
- Connects Outlook to SharePoint without new software.

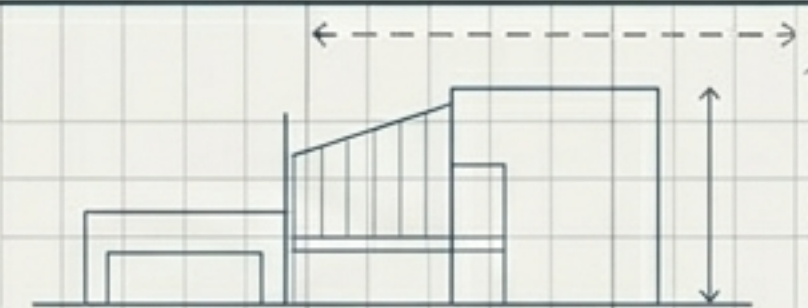


Scribe

(~\$59/month for 5 users)

- The fastest, lowest-friction way to capture live workflows.
- Silently records screenshots and clicks to instantly generate step-by-step SOPs.
- Ideal for documenting QBO job setups, submittals, and estimating folder setup to speed up PM ramp-up.

Operational Guardrails and Risk Mitigation


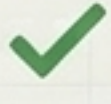





Identified Risks

-  **Risk 1:** AI misses or hallucinates scope details
-  **Risk 2:** Multiple conflicting sources of truth
-  **Risk 3:** Inconsistent folder hygiene
-  **Risk 4:** Security and permissions drift
-  **Risk 5:** Over-automating external communications

The Guardrails

Mandatory Mitigations

-  **Mitigation 1:** Mandatory "Human-in-the-Loop" sign-off on bids/exclusions.
-  **Mitigation 2:** Define a singular live working environment for active jobs.
-  **Mitigation 3:** Standardize job naming and handoff templates prior to automation.
-  **Mitigation 4:** Review workspace permissions before launch.
-  **Mitigation 5:** AI only drafts. Human review required for GC and billing outputs.

Six Critical Dependencies for Pilot Launch

Source of Truth:

Choose the live home for active job folders; stop treating all storage as authoritative.

Standardize 3 Templates:

Complete the bid intake, project handoff brief, and billing checklist.

Name the Pilot Team:

Appoint the Sponsor, Lead Estimator, PM Champion, Accountant, and IT support.

Capture Baseline KPIs:

Record the last 60-90 days of estimating and billing performance metrics.

Approve Content Set:

Select exact files and historical folders allowed into the AI workspaces.

Weekly Review Cadence:

Lock in a 30-minute weekly meeting to inspect outputs and correct process drift.

1

2

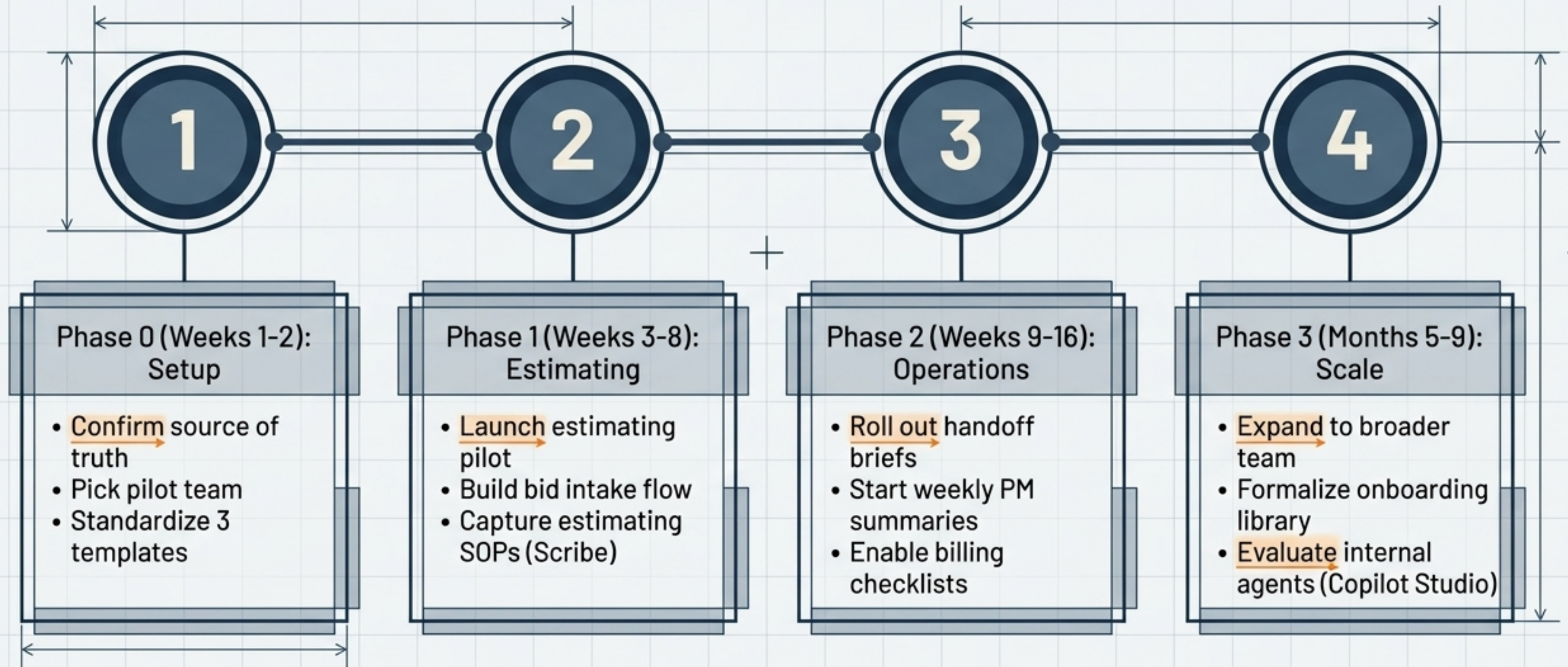
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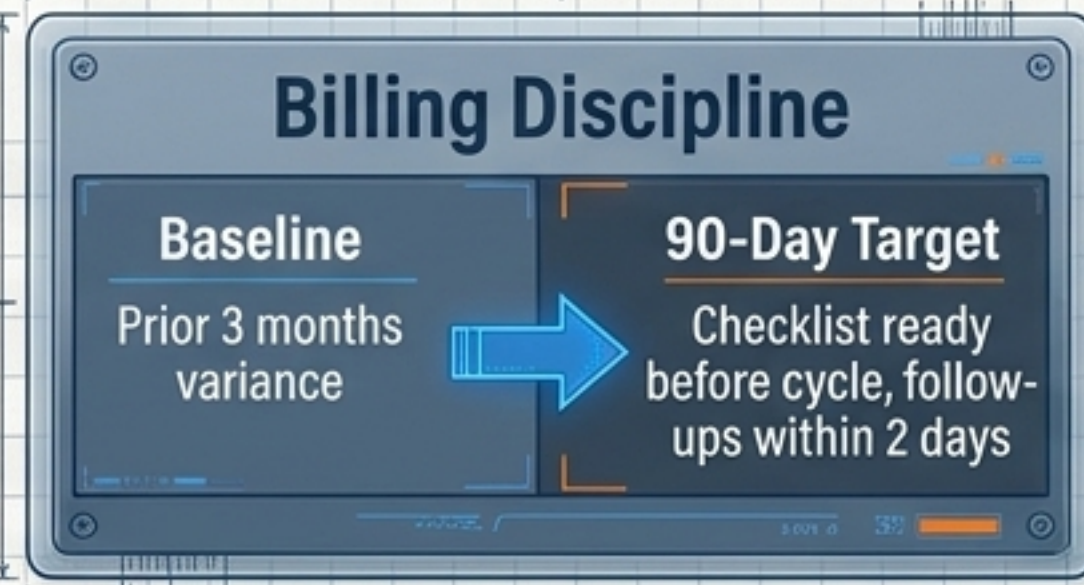
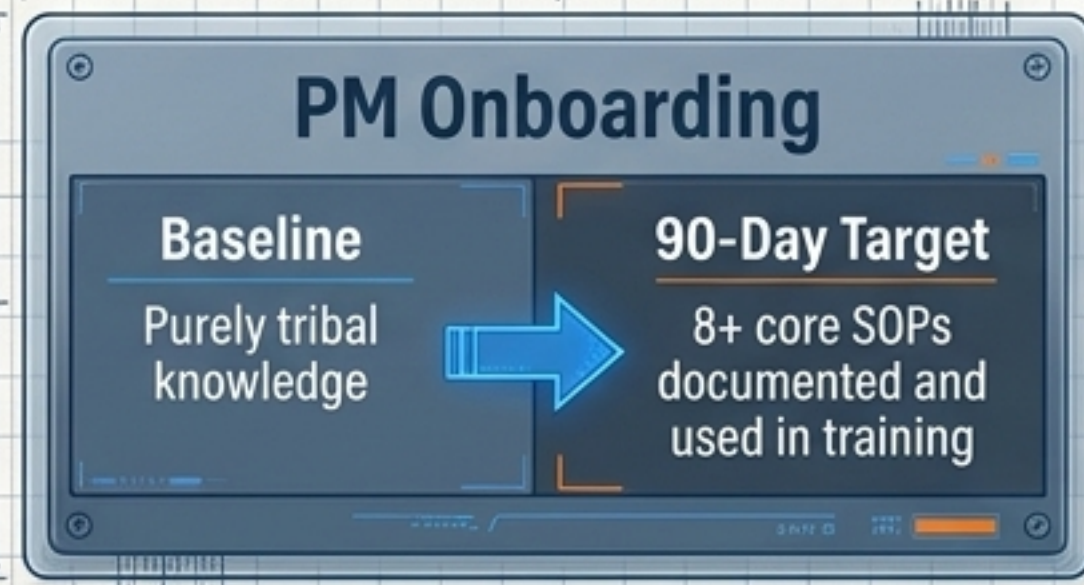
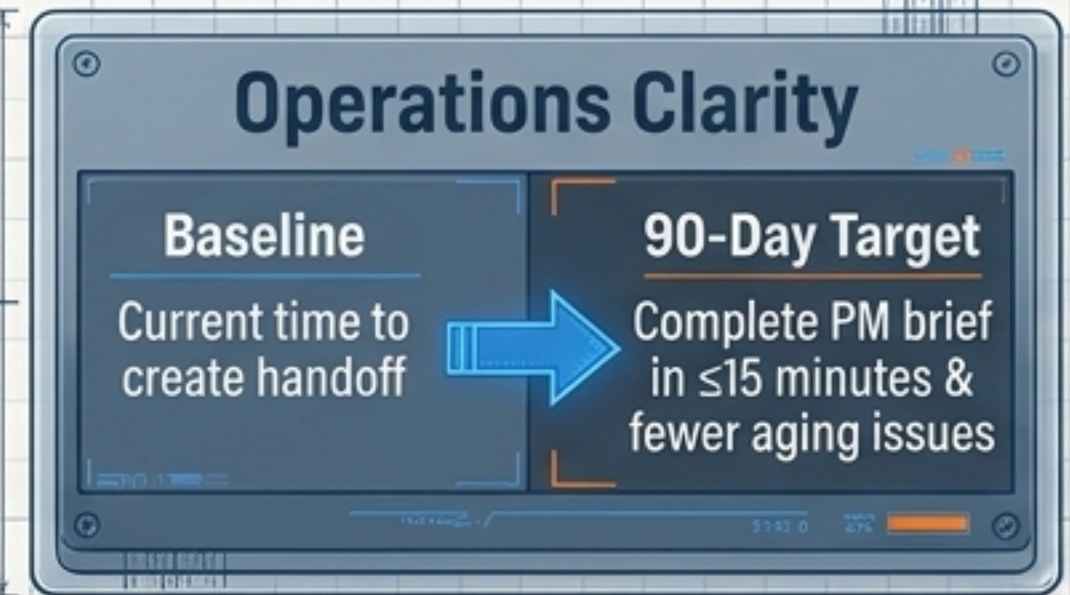
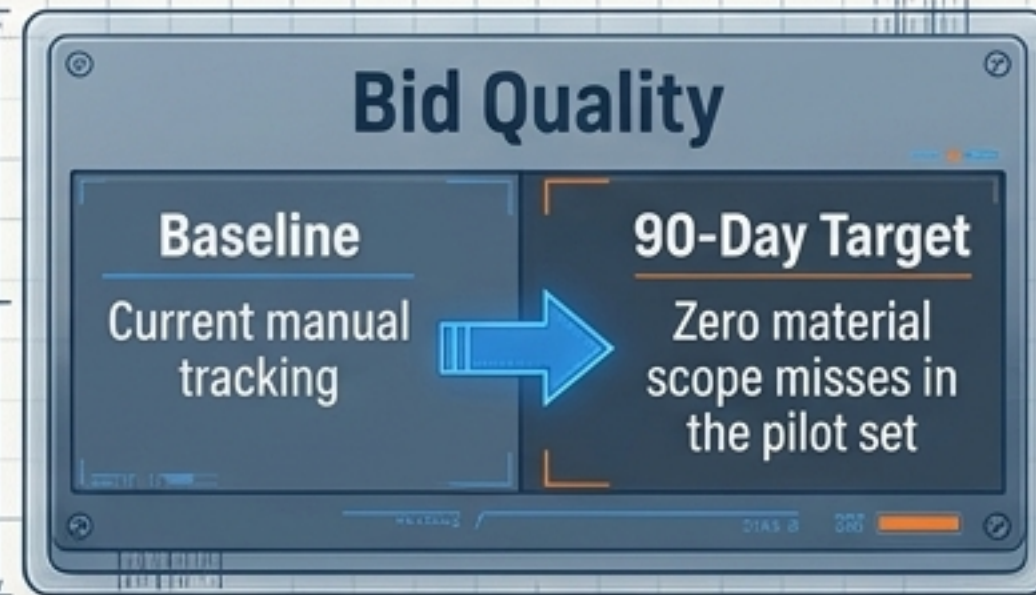
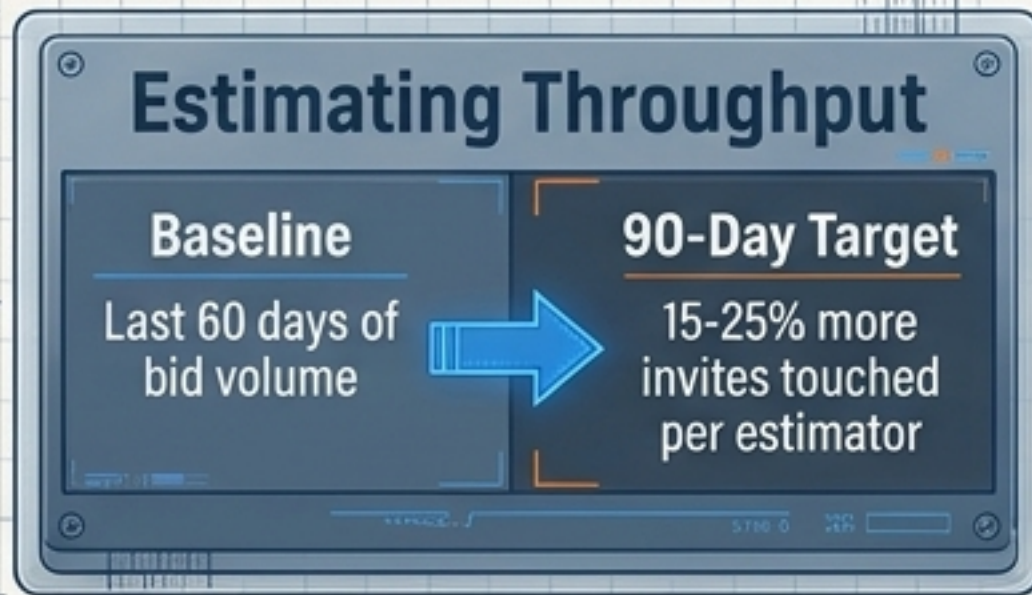
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Phased Implementation Roadmap



Measuring Pilot ROI and Success Thresholds



Execution Playbook: Core Prompt Architecture

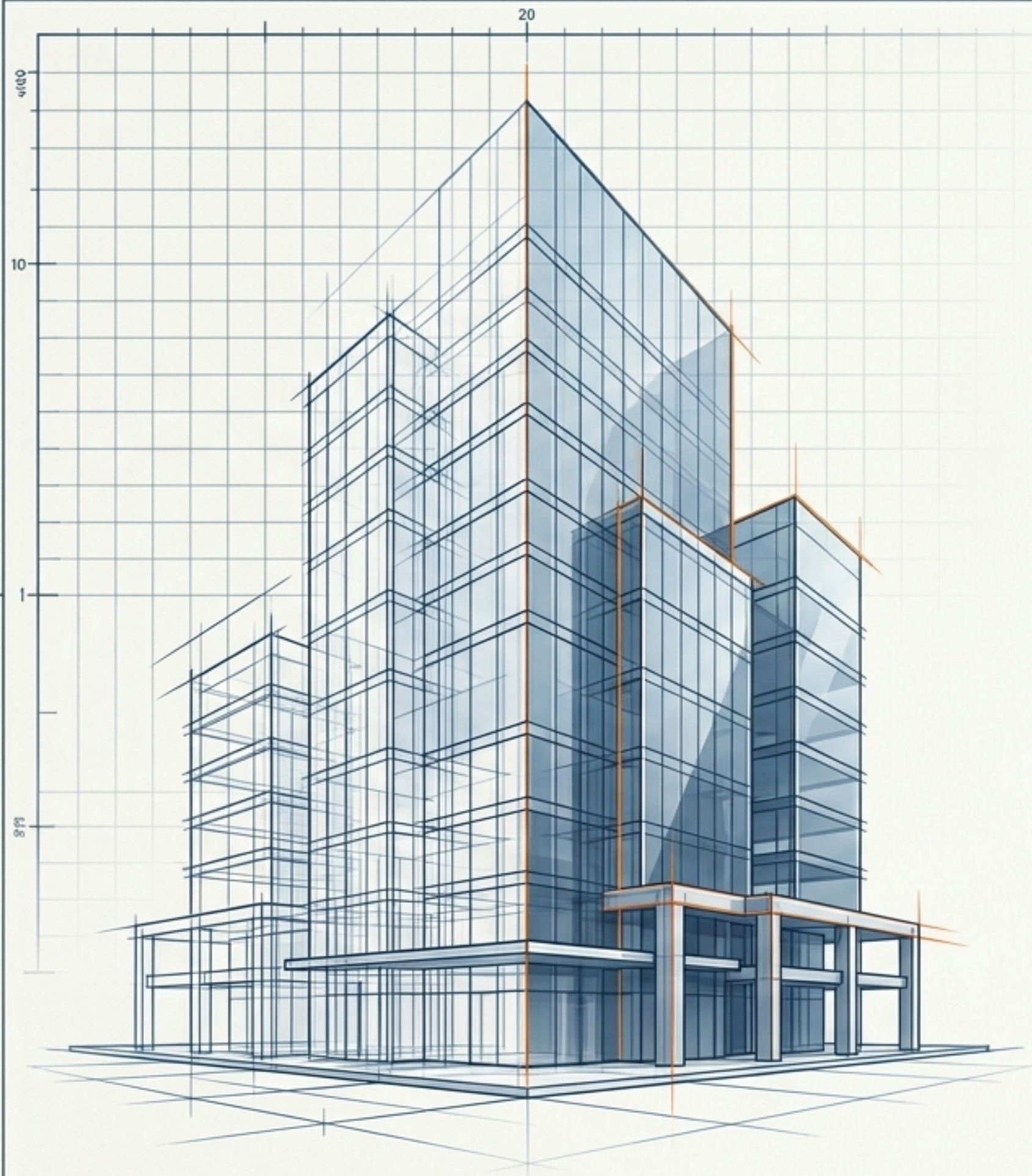
Bid Invite Triage (ChatGPT/Copilot)

[Role]	Act as a commercial glazing preconstruction coordinator.
[Inputs]	Attached bid invite email, spec index, portal notices.
[Action]	Extract job name, due date, addenda count, alternates, mandatory scope, red flags.
[Output]	Table (Field, Value, Confidence, Follow-up). Recommendation: pursue now/later/decline.

Scope Extraction (ChatGPT)

[Role]	Act as Starfell's estimating assistant.
[Action]	Build a scope coverage checklist (glass types, framing, fire-rated, sealants). List likely scope gaps.
[Output]	10 clarifying RFIs to send before pricing.

[Action]	Compare original package vs new addenda. Show ONLY changes affecting glazing scope, quantities, schedule.
[Output]	1) Change log, 2) Pricing impact checklist, 3) Scope letter updates.



The Reality of Rapid AI Evolution

The platforms and capabilities mapped in this blueprint represent the optimal path for Starfell Glass based on current data. The AI landscape shifts rapidly; this architecture focuses on durable, vendor-agnostic workflows (M365, ChatGPT) to insulate your operations from platform volatility.

Initiate Phase 0: Define the Pilot Team and lock the 3 core templates.

Disclaimer: Kehr Technologies is not responsible for post-delivery changes in tool pricing or availability. Revisit this audit periodically to adapt to evolving capabilities.