

AI Assessment Report

Strategic Blueprint for Starfell Glass

→ **Executive Briefing & Action Plan**

The Foundation



15-year commercial glazing track record with reliable repeat-customer demand



Established operations hub in Austin and sales/finance in Dallas



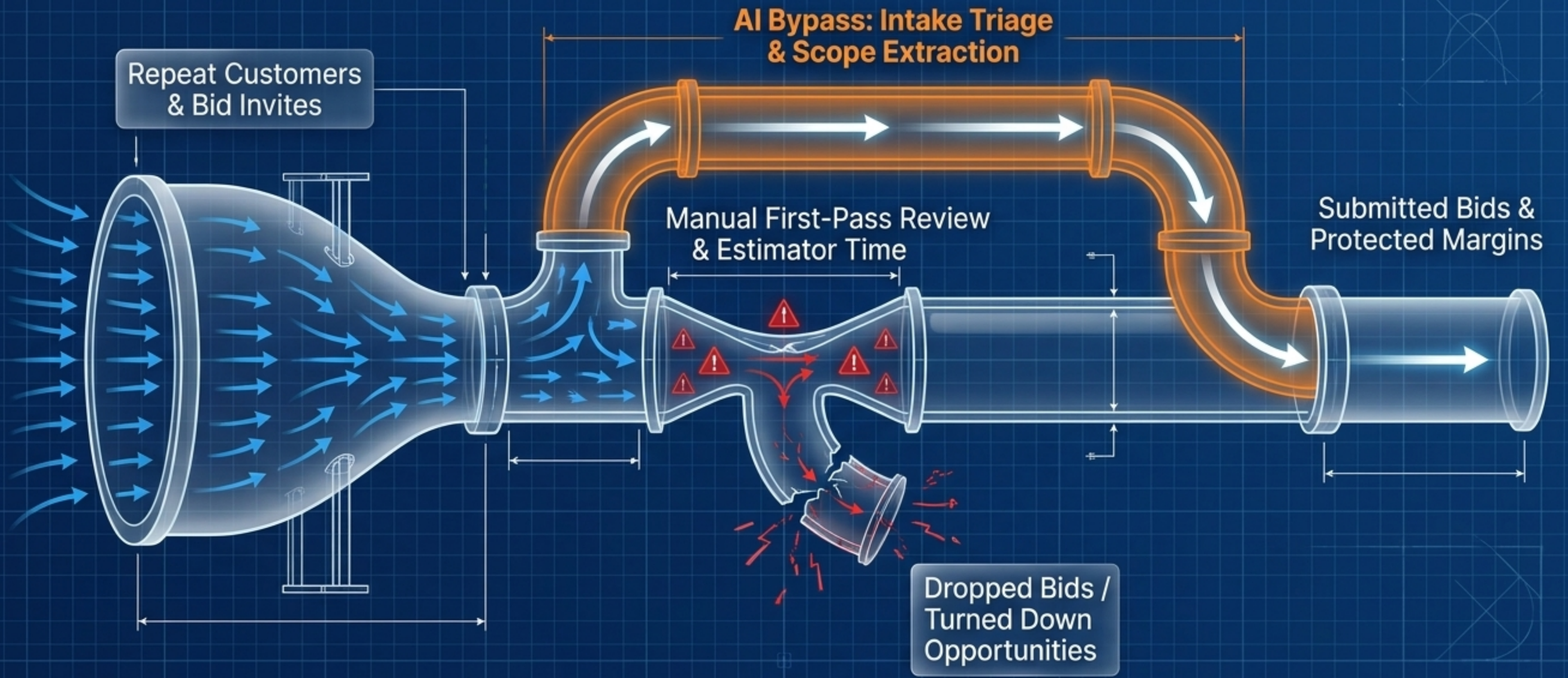
Solid digital footprint exists (Microsoft 365, QBO, Workyard, Bluebeam, GDS)

The Structural Cracks

Capacity Limit: Estimating throughput is the strict ceiling on growth. Starfell cannot bid everything invited to.

Opaque Communication: Core details are trapped in inboxes, personal folders, or delayed 48 hours for problem-solving.

Tribal Dependency: SOPs live in people's heads. PM onboarding and handoffs rely on verbal updates and whiteboard notes.



Repeat Customers & Bid Invites

AI Bypass: Intake Triage & Scope Extraction

Manual First-Pass Review & Estimator Time

Submitted Bids & Protected Margins

Dropped Bids / Turned Down Opportunities

Tool	Primary Role	Starfell Target Workflow	Monthly Cost Estimate	Why It's Needed
Microsoft 365 Copilot	Daily AI Assistant	Email summaries, PM meeting recaps, job risk tracking	~\$30/user	Keeps data in a familiar environment; zero platform switching.
ChatGPT Business	Secure Document Analysis	Bid package extraction, Addenda comparison, RFI drafting	\$25-\$30/user	Handles deep, multi-file analysis (drawings/specs) better than basic Copilot.
Power Automate Premium	Workflow Automation	Bid invite alerts, folder creation triggers, monthly billing reminders	~\$15/user	Native to existing MS environment; eliminates manual setup steps.
Scribe	SOP Capture & Training	Documenting QBO job setup, submittals, estimating folder setup	~\$59/team	Fastest, zero-friction way to extract tribal knowledge from experienced staff.

Workflow Copilot: Bid Intake

The Messy Input



Prompt 1: "Act as a commercial glazing preconstruction coordinator..."

The Clean Output

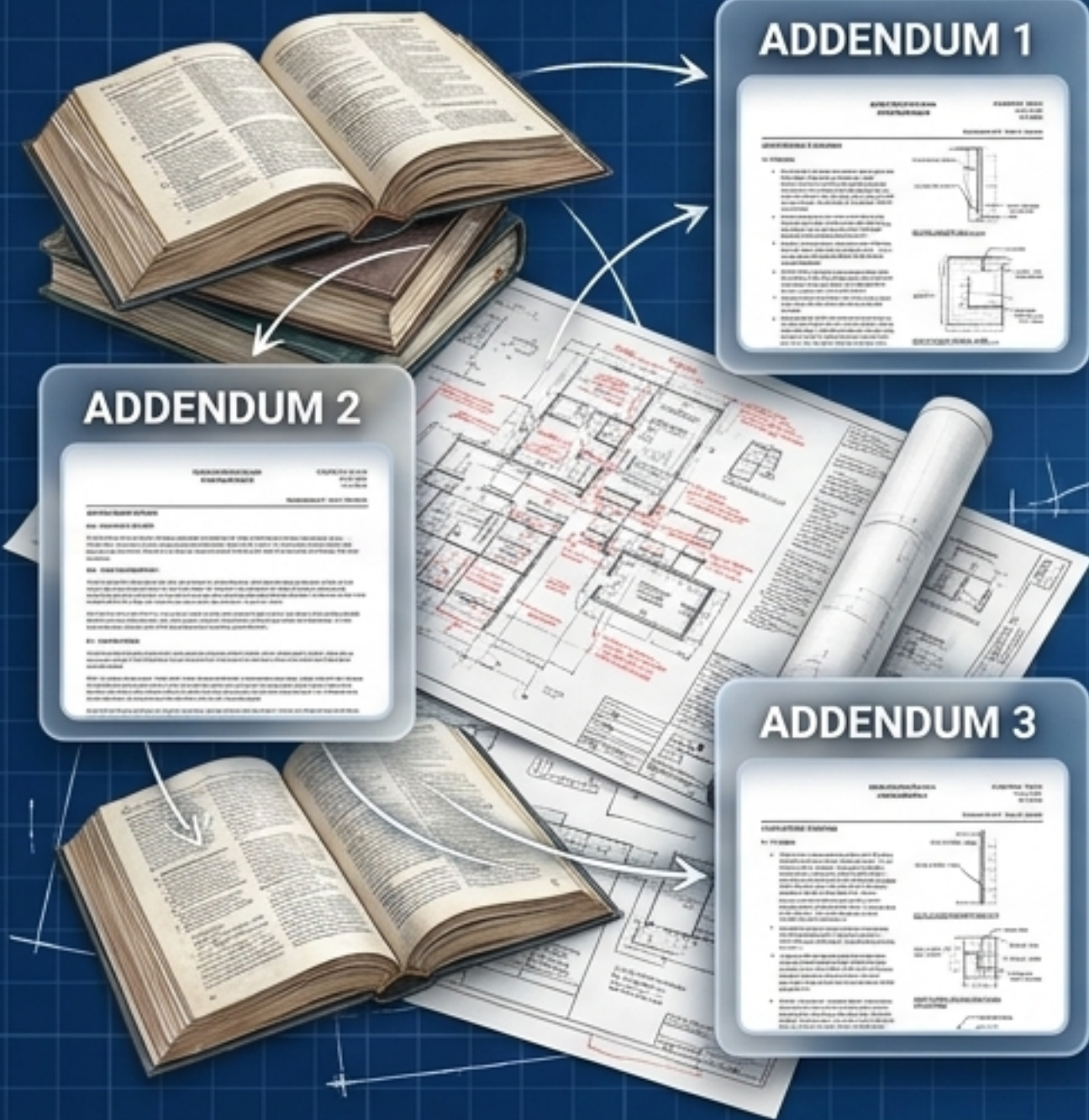
Field	Value	Confidence	Follow-up Needed
GC Name	Turner Construction	High	No
Due Date	October 25, 2024	High	No
Addenda Count	3	High	No
Mandatory Scope	Curtain Wall, Storefront, Entrances	Medium	Yes - Verify Specs

AI Recommendation: Pursue Later - Requires vendor quotes for custom hardware.

Takeaway: Eliminates the first 30 minutes of manual sifting per invite.

Workflow Copilot: Scope & Addenda

The Messy Input



Prompts 2 & 3:
"Build a scope coverage checklist... Compare against attached addenda..."

The Clean Output

Pricing Impact Checklist

- Glass types
- Fire-rated items
- Sealants

Change Log

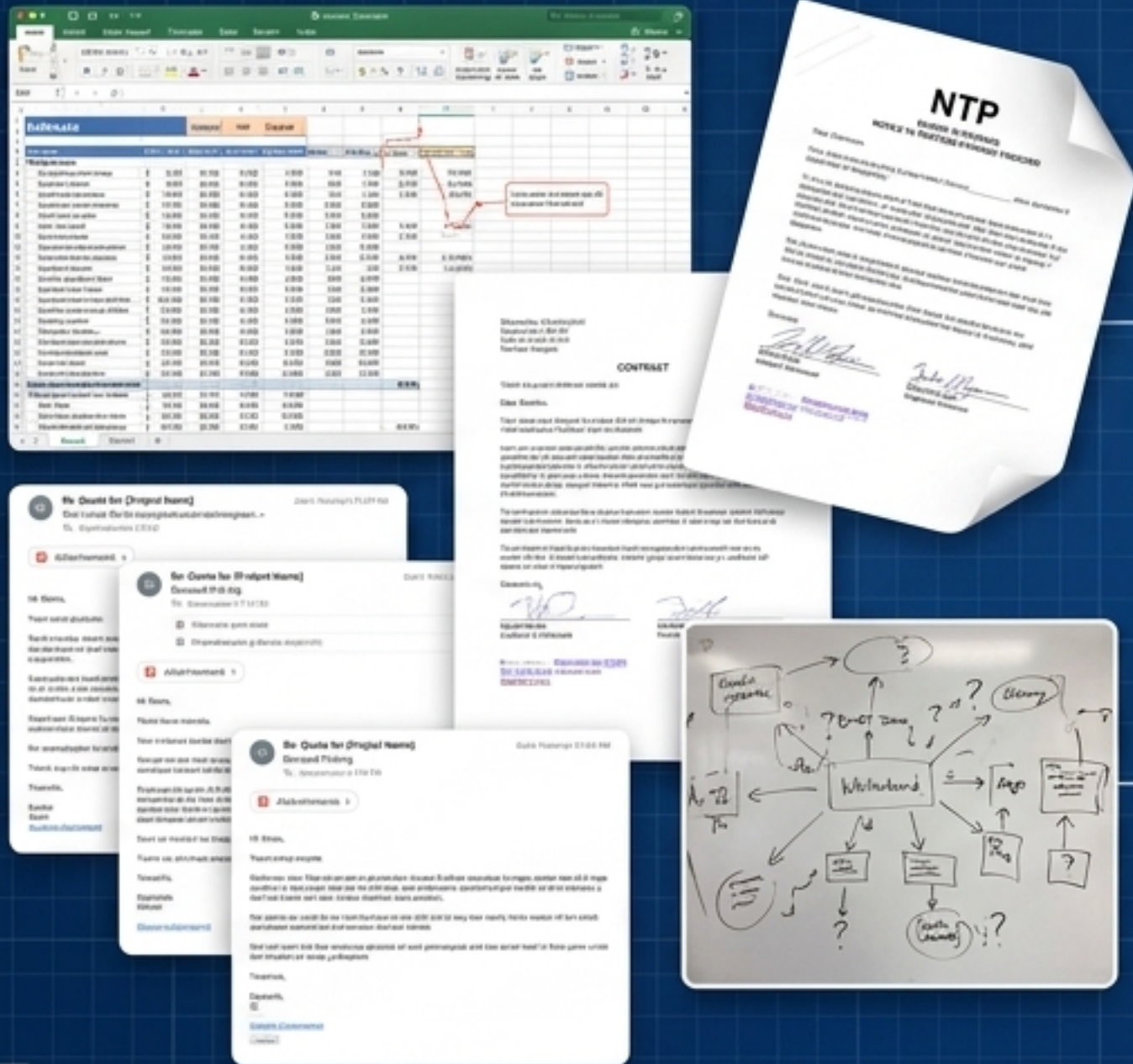
Addendum 2 shifted schedule; required submittals changed.

Generated Top 10 Clarifying RFIs to send before final pricing.

Takeaway: Zero material scope misses; immediate margin protection.

Workflow Copilot: PM Handoff

The Messy Input



Prompt 4:
"Create a week-one project brief for the PM..."

The Clean Output

One-Page Project Brief

Contractual Scope

- Core project deliverables and associated milestones and dependencies.
- Core project objectives, project and end-state, constraints and specifications.
- Specifications, and meeting for regulatory and customer requirements.
- Constraints include critical path activities.

Explicit Exclusions

- Items not included in the project scope.
- Not included in the project scope.
- Not included in the project scope.

Billing Milestones

Points	Condition
1	Masterplan by billing points and conditions
2	Finalize by billing points and conditions
3	Security by billing points and conditions
4	Finalize by billing points and conditions

Long-Lead Items

- Critical materials or equipment by long delivery times.
- Long-lead items responsibility.
- Lists critical materials or equipment with long delivery times.

Action List: The first 10 actions required for Week One.

Takeaway: Reduces PM onboarding time and guarantees operational alignment from Day 1.

Workflow Copilot: Escalation & Billing

The Messy Input



Prompts 5 & 6:
"Draft weekly risk summary...
Draft AIA billing checklist..."

The Clean Output

Weekly Escalation Draft

- Red flags, decisions
- overdue by >48 hours,
- outbound email draft to GC.

Billing Checklist

- Missing backup flags,
- internal lien timing reminders.

Keeps legal/financial judgment with humans; automates the preparation.

Takeaway: Breaks the 48-hour escalation delay; accelerates monthly billing cycles.

Blueprint to Throughput: Risk & Guardrails

Hallucinated Scope (Margin Loss)

Risk: AI misses or invents scope details.

✓ **Guardrail:** Mandatory human sign-off on bids/exclusions. AI must state uncertainty.

Data Drift (Wrong Files Analyzed)

Risk: Multiple sources of truth cause AI to reference outdated drawings.

✓ **Guardrail:** Strict folder naming hygiene and a designated single "live home" for active jobs.

Over-Automation (Trust Damage)

Risk: AI sends an incorrect external email to a GC or owner.

✓ **Guardrail:** AI drafts only. Human review step required before any external send, billing, or lien-related output.

Security Drift (Sensitive Data Leak)

Risk: Internal financials reach the wrong employees.

✓ **Guardrail:** Named business-grade licenses only. Pre-launch SharePoint permissions audit.

Pilot Readiness: Foundational Prerequisites

Source of Truth

Stop treating all storage locations as equal. Pick the definitive live folder.

Template Pack

Standardize 3 core documents before launch: Bid Intake, Project Handoff Brief, Billing Checklist.

Pilot Team

Name the key players: Pilot Sponsor, Lead Estimator, PM Champion, Accountant, IT Support.

Baseline KPIs

Capture the last 60-90 days of estimating/billing performance to measure ROI accurately.

Review Cadence

Schedule a strict 30-minute weekly review to save good prompts and eliminate noise.

Blueprint to Throughput: 4-Phase Implementation Roadmap

Phase 0 (Weeks 1-2): Foundation

Pick pilot team, confirm source of truth, standardize 3 templates.

Phase 1 (Weeks 3-8): The Estimating Bypass

Launch ChatGPT pilot, build Power Automate intake flow.

ROI Target: 15-25% more invites touched. Zero material scope misses.

Phase 2 (Weeks 9-16): Operations & Cash Flow

Roll out handoff briefs, start weekly PM summaries, enable billing checklists.

ROI Target: Handoff briefs generated in <15 mins. Follow-ups within 2 days of trigger.

Phase 3 (Months 5-9): Scale & Institutionalize

Expand to broader team, formalize Scribe SOP library.

ROI Target: 8+ new SOPs documented; visible reduction in PM ramp time. >70% weekly active use.