

# AI ASSESSMENT REPORT

STARFELL GLASS

# 1. Executive Summary

## Primary constraint

Estimating throughput is the clearest growth limiter. Repeat work exists, but Starfell cannot bid everything it is invited to.

## Best first AI fit

Bid intake, scope extraction, addenda comparison, and handoff summaries are the fastest path to value.

## What success looks like

More bids touched, fewer dropped details, earlier risk escalation, faster PM ramp-up, and tighter billing follow-through.

Starfell Glass is a strong candidate for a focused AI rollout because the business already runs on a meaningful digital footprint – Outlook, SharePoint, Excel, QBO, Workyard, Bluebeam, Adobe, and GDS – and its biggest constraints are document-heavy and communication-heavy rather than purely transactional. **Based on the audit, Starfell does not have a lead-generation problem; it has a throughput and execution-consistency problem.** The highest-value role for AI is to reduce manual review, summarize complex project information, standardize handoffs, and prompt earlier action on issues that today sit in inboxes, PDFs, folders, and people's heads.

## Expected Outcomes

- Increase bid coverage and reduce estimator first-pass review time without immediately adding headcount.
- Reduce scope misses and addenda risk by turning bid packages into structured checklists and summaries.
- Improve handoffs from estimator to PM to superintendent by standardizing kickoff information.
- Encourage earlier issue escalation and clearer communication with GCs, suppliers, and field leaders.
- Shorten PM onboarding time by converting tribal knowledge into searchable playbooks and prompts.
- Improve billing and collections discipline through better readiness checklists, reminders, and follow-up drafts.

## Value At A Glance

Starfell's best early AI use cases are not abstract innovation projects. They are practical helpers for estimating, handoffs, communication, and document-heavy work.

The recommended approach is to layer AI onto the existing Microsoft 365 and SharePoint environment first, then decide later whether a more custom assistant is warranted.

AI should be used to reduce review time, standardize checklists, and improve response quality – not to replace final judgment on bids, measurements, contracts, or legal matters.

## 2. Current State Overview

The current operational landscape is workable but fragile. Starfell already has enough digital infrastructure to support a useful AI pilot, but the business still depends heavily on email, folder discipline, personal knowledge, and verbal coordination. That creates real upside – and real risk if a few core workflows are not standardized first.

### 2.1 Operational Landscape Snapshot

Area	Observation
Business profile	15-year commercial glazing fabricator/installer with 16-50 employees and a flat structure.
Operating model	Austin is the primary operations hub for estimating, fabrication, most PM work, and installation. Dallas carries sales, accounting, collections, installation, and some less-experienced estimating/PM capacity.
Demand picture	Repeat customers are the primary source of work. The biggest growth issue is converting available bid opportunities into submitted bids.
Systems in use	HubSpot and Outlook for customer information; Excel for bids and backlog; SharePoint/Synology for files; QBO and Workyard for financial and labor/job-cost data; Bluebeam, Adobe, and GDS for drawings and shop work.
Process maturity	Core workflows are known, but SOPs are largely tribal knowledge. Handoffs depend on email, folders, whiteboards, and face-to-face updates.
Communication reality	Communication appears workable at a high level, but project-critical details still get delayed, buried in email, or held back while someone tries to solve a problem first.
Performance visibility	Operational visibility is concentrated with ownership. Broader manager-level dashboards and structured scorecards are limited.

## 2. Current State Overview

### 2.2 AI Readiness Snapshot

Readiness Area	Current Assessment	Why It Matters
Digital content availability	Moderate	Most key work already lives in digital files, email, and spreadsheets, which makes Starfell a good fit for extraction, summarization, and search.
Process standardization	Low	AI can speed up inconsistent work, but it can also scale inconsistency. Templates and a few core SOPs should come first.
System integration	Low to Moderate	Very little is connected today, so near-term wins should use lightweight automation around Microsoft 365 before deeper integration work.
User adoption readiness	Moderate	Teams already rely on email, SharePoint, and iPads in the field. The best pilot is one that improves current habits instead of forcing a new app on everyone.
Data quality for analytics	Moderate to Low	QBO and Workyard provide a starting point, but job costing and bonus logic are not yet clean enough for immediate advanced AI analytics.

#### What is working

- Strong repeat-customer base and reliable demand.
- Leadership is clear on the real bottlenecks.
- Existing Microsoft footprint is a strong foundation for practical AI.
- The organization is small enough to pilot changes without heavy bureaucracy.

#### What is fragile

- Estimating capacity is the main limiter on growth.
- Operations communication depends too much on memory and informal follow-up.
- Very little SOP documentation exists, which slows onboarding and consistency.
- Addenda monitoring, project handoffs, billing prep, and collections are still highly manual.

# 3. AI Opportunity

The best-fit AI opportunities are the ones that convert unstructured information into a consistent operating brief. Starfell deals with bid packages, addenda, estimates, exclusions, kickoff information, field updates, and billing support documents every day. Those are ideal places for AI to assist because the work is repeatable, document-heavy, and currently slowed by manual review.

## 3.1 Prioritized Use Cases

Use Case	AI Application	Business Value	Ease	Priority
1. Bid package intake and scope extraction	Extract project details, due dates, scope items, alternates, exclusions to confirm, supplier quote needs, and risk flags into a standard review brief.	Very High	High	P1
2. Addenda and version-change monitor	Compare each new addendum against the current set and summarize what changed, what affects Starfell's scope, and what action is required.	Very High	High	P1
3. Contract-to-kickoff handoff assistant	Generate a kickoff packet from the final estimate, exclusions, contract/NTP, contacts, drawing set, and early milestones.	High	High	P1
4. PM / superintendent communication copilot	Turn field notes, emails, and meeting notes into a clear internal or GC-ready update with issue, impact, options, owner, and next step.	High	Medium	P2
5. SOP and onboarding knowledge base	Convert current emails, templates, job folders, and manager explanations into a searchable assistant and role-based SOP library.	High	Medium	P2
6. Billing, collections, and lien workflow assistant	Draft billing-readiness checklists, follow-up emails, aging summaries, and internal reminders while keeping legal judgment with humans.	Medium to High	Medium	P3
7. Job-cost insight and PM scorecards	Summarize cost and labor variance, explain margin movement, and support manager scorecards once data quality improves.	High	Low to Medium	P3

# 3. AI Opportunity

## 3.2 How AI Supports Each Use Case

Use Case	Why It Matters at Starfell
1. Bid package intake and scope extraction	Reviewing plans and catching all scope is the biggest estimating time sink and the highest margin-risk activity.
2. Addenda and version-change monitor	Addenda arrive through portals and email, and missing a change creates direct pricing risk.
3. Contract-to-kickoff handoff assistant	New job handoff is folder- and email-driven, and PM planning is tracked in personal folders.
4. PM / superintendent communication copilot	Issues are sometimes held for 24-48 hours before escalation, which reduces options and increases stress.
5. SOP and onboarding knowledge base	Training a new PM is slow, owner-dependent, and hard to scale because know-how is not documented.
6. Billing, collections, and lien workflow assistant	Slow pay and lien administration hurt cash flow, but not every step is consistently triggered from a structured checklist.
7. Job-cost insight and PM scorecards	Leadership wants cleaner job costing and possible bonus structures, but source data is not fully dialed in yet.

## 4. Tool Selection Criteria

The stack below is designed for fit, speed, and realistic adoption. It intentionally favors the tools Starfell is most likely to use every day, rather than a large all-at-once platform change. The stack is also layered: Copilot supports daily work in Microsoft 365, ChatGPT Business handles deeper multi-file analysis, Power Automate manages workflow triggers, and Scribe captures the process knowledge Starfell currently carries in people's heads.

*Pricing should be confirmed before purchase. Figures below reflect public list pricing reviewed in March 2026 and are best used as planning estimates.*

<b>Microsoft 365 Copilot</b>	
<b>Category</b>	AI productivity assistant for daily work
<b>What it solves</b>	Scattered communication, manual summarization, and too much project intelligence trapped inside Outlook, Teams, SharePoint, and Excel.
<b>Why selected</b>	Starfell already lives in Office 365. That lowers change management, keeps data in a familiar environment, and makes adoption much more likely than adding another collaboration platform.
<b>Suggested use at Starfell</b>	Email thread summaries, project briefs, meeting recaps, change-order drafts, weekly PM summaries, and Excel analysis for backlog and risk tracking.
<b>Implementation difficulty</b>	<b>Medium</b>
<b>Estimated monthly cost</b>	\$30/user/month as an add-on to a qualifying Microsoft 365 plan. Suggested 5-user pilot: about \$150/month.

## 4. Tool Selection Criteria

<b>ChatGPT Business</b>	
<b>Category</b>	Secure AI workspace for document analysis and reusable prompts
<b>What it solves</b>	First-pass analysis of bid packages, spec sections, addenda, RFIs, and large multi-file document sets.
<b>Why selected</b>	It offers flexible file analysis, a team workspace, reusable shared prompts, and company knowledge support. It is a much better fit than consumer AI accounts for estimating, training, and structured analysis.
<b>Suggested use at Starfell</b>	Scope extraction, addenda comparison, pursue/decline screening, vendor and RFI draft creation, and a PM onboarding assistant built from saved prompts and approved documents.
<b>Implementation difficulty</b>	<b>Low-Medium</b>
<b>Estimated monthly cost</b>	\$25/user/month billed annually or \$30/user/month billed monthly. Suggested 5-user pilot: about \$125-\$150/month.

## 4. Tool Selection Criteria

<b>Power Automate Premium</b>	
<b>Category</b>	Workflow automation
<b>What it solves</b>	Manual monitoring of inboxes, addenda notices, recurring reminders, and folder or setup steps that should happen the same way every time.
<b>Why selected</b>	It is native to Outlook, Teams, SharePoint, and Excel, so it fits Starfell's current environment better than a standalone automation platform for phase 1.
<b>Suggested use at Starfell</b>	Bid invite intake flow, addenda alerts, folder creation triggers, monthly billing reminders, and collections reminder sequences with clear owners.
<b>Implementation difficulty</b>	<b>Medium</b>
<b>Estimated monthly cost</b>	\$15/user/month for builder licenses. Suggested pilot: 2 builder seats at about \$30/month. Unattended process licensing can be evaluated later if needed.

## 4. Tool Selection Criteria

<b>Scribe</b>	
<b>Category</b>	SOP capture and training
<b>What it solves</b>	Tribal knowledge, slow PM ramp-up, and inconsistent handoffs between estimating, operations, and accounting.
<b>Why selected</b>	It is the fastest low-friction way to capture live workflows with screenshots and step-by-step instructions. That makes it a stronger phase-1 fit than rolling out a heavier LMS or knowledge platform.
<b>Suggested use at Starfell</b>	Documenting submittals, procurement, change orders, QBO job setup, billing handoff, and estimating folder setup so repeat work becomes teachable.
<b>Implementation difficulty</b>	<b>Low</b>
<b>Estimated monthly cost</b>	Team plans start around \$59/month for 5 users; personal seats are also available for smaller capture needs.

## 4. Tool Selection Criteria

### Copilot Studio (optional / later phase)

<b>Category</b>	Custom internal AI agents
<b>What it solves</b>	Reusable internal Q&A agents across SharePoint and Teams when Starfell's templates and source systems are stable enough to support them.
<b>Why selected</b>	It keeps agents inside the Microsoft environment and can leverage Copilot licensing. This matters later, but only after phase-1 workflows are standardized and trusted.
<b>Suggested use at Starfell</b>	An internal bid-package assistant, a project-status lookup agent, or a searchable operations knowledge assistant built against approved SharePoint content.
<b>Implementation difficulty</b>	<b>High</b>
<b>Estimated monthly cost</b>	Internal agents are included for Microsoft 365 Copilot users. Separate usage-based licensing can be considered later for broader or external-channel scenarios.

# 5. Risks, Constraints, & Dependencies

## 5.1 Risk Register

Risk	Why it matters	Recommended mitigation
AI misses or invents scope details	Margin loss or incorrect commitments	Require human sign-off on bids, exclusions, and all external communication. Use checklists and confidence-based reviews.
Too many sources of truth	Wrong documents get analyzed or handed off	Decide which environment is the live working source for active jobs and define the role of any mirrored storage.
Inconsistent naming and folder hygiene	Poor retrieval and weak automation results	Standardize job naming, folder structures, and handoff templates before scaling automation.
Security and permissions drift	Sensitive data reaches the wrong people	Use business-grade plans, pilot with named users, and review folder and workspace permissions before launch.
Over-automation of customer or GC communication	Trust damage or compliance errors	Keep a human review step on bids, billing, collections escalation, and any lien-related output.
Change fatigue or low adoption	The tools get purchased but not used	Start with a narrow pilot, weekly coaching, named owners, and a measured list of use cases.

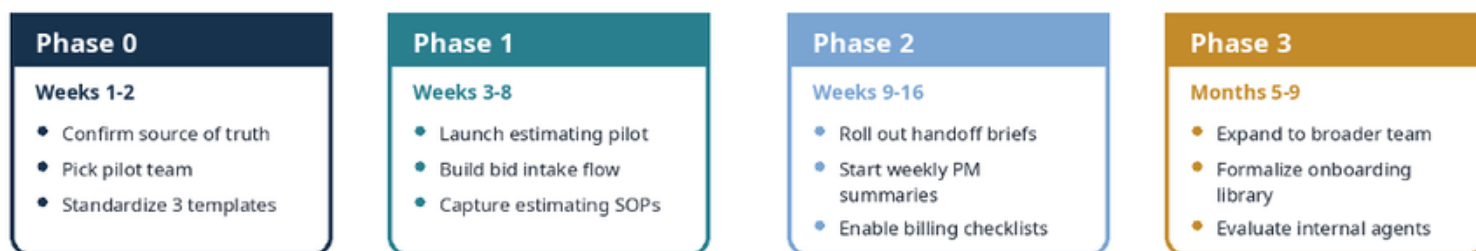
# 5. Risks, Constraints, & Dependencies

## 5.2 Critical Dependencies

Dependency	What must happen before scale
Source of truth	Choose the live home for active job folders and stop treating every storage location as equally authoritative.
Template pack	Create 3 standard templates before pilot launch: bid intake, project handoff brief, and billing checklist.
Pilot team	Name the pilot sponsor, lead estimator, PM champion, accountant reviewer, and IT support contact.
Baseline KPIs	Capture the last 60–90 days of estimating, handoff, and billing performance so the pilot can be measured against a real baseline.
Approved content set	Pick the exact files, folders, and examples allowed into AI workspaces or shared prompts during the pilot.
Review cadence	Set a weekly 30-minute pilot review to inspect outputs, save useful prompts, and correct process drift quickly.

# 6. Recommended Roadmap

This roadmap is designed to deliver value quickly while building the foundations required for reliable AI and reporting.



## 6.1 ROI Measurement Plan

Workstream	KPI	Baseline	Suggested 90-day success threshold	Owner
Estimating throughput	Bid invites triaged and bids submitted per estimator	Last 60 days of bid volume	15-25% more invites touched or equivalent time savings	Lead estimator
Bid quality	Scope or addenda misses found after submission	Track current misses manually	Zero material misses in the pilot set	Estimator + owner
Operations clarity	Time to create handoff brief and count of issues older than 48 hours	Review 10 recent jobs	Handoff brief in <=15 minutes and fewer aging open issues	PM lead
Onboarding	Number of SOPs documented and visible reduction in PM ramp time	Current state is mostly tribal	8+ SOPs documented and used in training	Owner / PM lead
Billing discipline	Days from monthly trigger to complete billing package and follow-up timing	Review prior 3 months	Checklist ready before the monthly billing cycle and follow-up within 2 business days of trigger	Accountant
Adoption	Weekly active use by pilot users and saved shared prompts	Starts at 0	More than 70% weekly active use in the pilot group	Pilot sponsor

# 7. AI Prompts and Setup

This section gives Starfell three practical pieces to start with immediately: simple workflow diagrams, ready-to-use prompts, and plain-language implementation checklists. The prompts below are written to reinforce a consistent working style: use AI for a first pass, ask it to show uncertainty, and require a human review before anything external is sent.

## 6.1 Prompt Library

Attach the relevant files before running these prompts. Save the strongest versions as shared prompts inside the pilot workspace so the team uses the same language and structure every time.

### Prompt 1 – Bid invite triage and pursue / decline screen

<b>Purpose</b>	Create a fast, repeatable first-pass review of new bid invites.
<b>Recommended tool</b>	ChatGPT Business or Microsoft 365 Copilot with the email thread and attached package.
<b>Prompt</b>	Act as a commercial glazing preconstruction coordinator for Starfell Glass. Review the attached bid invite email, drawings/spec index, and any portal notices. Extract the job name, GC or customer, location, bid due date and time, addenda count, alternates, mandatory scope items, likely vendor quotes needed, and any red flags that could make this a poor fit. Output a table with columns: Field, Value, Confidence, Follow-up Needed. Then give a short recommendation: pursue now, pursue later, or decline, and explain why. Do not invent missing information. If something is not stated, write not found.

# 7. AI Prompts and Setup

## Prompt 2 – Scope extraction and gap checklist

<b>Purpose</b>	Reduce the chance of missing scope or pricing the wrong document set.
<b>Recommended tool</b>	ChatGPT Business
<b>Prompt</b>	Act as Starfell Glass's estimating assistant. Review these plans, specs, and addenda. Build a scope coverage checklist for a glazing estimator to verify manually. Include glass types, framing systems, entrances and hardware, finishes, fire-rated items, sealants, delegated design items, mockups, testing, engineering, field measurements, permits if referenced, long-lead items, and vendor or subcontracted scope. Then list likely scope gaps or ambiguities that could hurt margin if missed. Finish with the 10 best clarifying questions or RFIs to send before final pricing.

## Prompt 3 - Addenda comparison and impact review

<b>Purpose</b>	Identify only the changes that matter to Starfell's scope, schedule, and pricing.
<b>Recommended tool</b>	ChatGPT Business
<b>Prompt</b>	Compare the original bid package against the attached addenda. Show only changes that affect glazing scope, quantities, schedule, alternates, exclusions, field conditions, or required submittals. Output three sections: 1) Change log in plain English, 2) Pricing impact checklist, 3) Clarifications or exclusions that should be updated in the scope letter. If a change is unclear, mark it for estimator review instead of guessing.

# 7. AI Prompts and Setup

## Prompt 4 – Project handoff brief

<b>Purpose</b>	Turn a signed job into a clean week-one project brief for the PM.
<b>Recommended tool</b>	Microsoft 365 Copilot or ChatGPT Business
<b>Prompt</b>	Act as a project handoff coordinator for Starfell Glass. Using the final estimate, scope letter, signed contract or notice to proceed, drawings, contact list, and vendor quotes, create a one-page project brief for the PM. Include job summary, contractual scope, exclusions, key contacts, billing milestones, long-lead items, required submittals, field-measurement risks, known schedule constraints, and the first 10 actions for week one. Highlight anything that must be clarified before procurement or installation begins.

## Prompt 5 – Weekly PM risk summary and escalation draft

<b>Purpose</b>	Help PMs surface problems sooner instead of holding them for 24-48 hours.
<b>Recommended tool</b>	Microsoft 365 Copilot
<b>Prompt</b>	Act as a project executive assistant for Starfell Glass. Review this week's emails, meeting notes, vendor updates, submittals, RFIs, and field notes for the attached job. Create a concise weekly risk summary with five sections: what changed, red flags, items overdue more than 48 hours, decisions needed, and communication that should happen now. Then draft the outbound message that the PM should send to the GC, vendor, or owner to get ahead of the issue. Use plain language and call out any item that could affect margin, schedule, or trust.

# 7. AI Prompts and Setup

## Prompt 6 – Billing and collections assistant

<b>Purpose</b>	Improve package completeness and follow-up consistency without turning AI into legal advice.
<b>Recommended tool</b>	Microsoft 365 Copilot or ChatGPT Business
<b>Prompt</b>	Act as a billing and collections coordinator for Starfell Glass. Review current job status, percent complete, approved change orders, prior billings, and recent email history. Draft: 1) the checklist for this month's AIA or invoice package, 2) the follow-up email to the customer, and 3) an internal note that identifies missing backup, outstanding approvals, and any timing concerns related to collections or lien process. Do not give legal advice. Flag anything that should be reviewed by accounting or counsel.

### 6.2 Implementation Guides

The checklists below are intentionally plain and short. Starfell does not need a long transformation program to get started. It needs a named pilot team, a few clean templates, and a weekly review loop.

## Microsoft 365 Copilot setup

1. Confirm the existing Microsoft 365 plan qualifies for Copilot or choose the right upgrade path.
2. Assign pilot licenses to the owner, lead estimator, PM lead, a second PM or superintendent-facing coordinator, and the accountant.
3. Review SharePoint, Teams, and Outlook permissions so Copilot only sees the content those users should access.
4. Create a shared prompt gallery in Teams or SharePoint for the top use cases: handoff brief, weekly PM summary, billing checklist, and email summarization.
5. Run a weekly pilot review to save the prompts that work and retire the ones that create noise.

**Done when:** The pilot team is using Copilot on live work, and at least three repeatable prompts are saved centrally.

# 7. AI Prompts and Setup

## ChatGPT Business setup

1. Create a Business workspace with named users only; do not rely on free personal AI accounts.
2. Create shared projects for Estimating, Operations, and Billing so prompts and files stay organized by workflow.
3. Upload only approved sample documents and templates to seed the workspace - not every historical file at once.
4. Save the core prompt library as shared prompts and define a rule that every important output must state uncertainty instead of guessing.
5. Keep a simple error log of bad outputs so prompts can be tightened quickly.

**Done when:** The workspace has defined owners, approved files, and shared prompts the team can reuse consistently.

## Power Automate setup

1. Start with two flows only: bid invite intake and monthly billing reminder.
2. Map the trigger, owner, and destination for each flow before building anything.
3. Use Outlook, SharePoint, Teams, and Excel or Lists as the primary connectors for the pilot.
4. Add a human approval or review step before any external email or downstream action that changes a customer-facing record.
5. Test each flow on 10 real examples before calling it live.

**Done when:** The pilot flows run reliably, create less manual follow-up, and have a named person who owns exceptions.

# 7. AI Prompts and Setup

## Scribe setup

1. Install Scribe for the small group actually documenting work first.
2. Assign two SOP captures to each core function: estimating, PM, and accounting.
3. Capture the workflow while doing the live task, then clean the guide immediately while the details are fresh.
4. Store approved guides in a shared onboarding library in Teams or SharePoint and name an owner for each guide.
5. Review and refresh the top guides monthly so the library stays relevant.

**Done when:** Starfell has a living SOP library instead of one-time documentation that goes stale.

# Disclaimer

## **A quick note on the nature of AI...**

The tools, platforms, and capabilities available today may look very different six months from now. That is the nature of one of the fastest-moving industries in history. Every report is built around the best available information at the time of delivery, and all tool recommendations, pricing references, and platform capabilities are based on available data as of your report date.

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