
Summit Comfort HVAC

As of September 21, 2026

BUSINESS PROFILE

Regional HVAC contractor serving homeowners and small commercial properties. Services include AC and furnace installation, emergency repair, and seasonal maintenance contracts. Peak summer and winter demand drives scheduling and dispatch pressure across a fleet of field technicians.

BUSINESS TYPE

Private Company

INDUSTRY

Construction & Contracting

LOCATION

United States

OPERATING REGIONS

North America

COMPANY SIZE

Small (11–50 employees)

CUSTOMER TYPES

Consumer, Small & Medium Businesses

BUSINESS MODEL

Fee-for-Service

REGULATORY CONTEXT

Other

STRATEGIC PRIORITIES

Operational Efficiency, Cost Reduction, Talent, Revenue Growth

KEY SYSTEMS

CRM, Accounting, Custom / Proprietary

DATA SENSITIVITY

Personally Identifiable Information (PII), Financial Records

CURRENT BUSINESS AI POSTURE

MARKETING

Experimenting

Office manager uses ChatGPT to draft seasonal marketing copy. No process or approval in place.

SALES

Avoiding

No AI tools in use for quoting or sales follow-up. Still manual.

DELIVERY

Experimenting

Technicians informally use online lookups and manufacturer sites on-site. No formal AI tooling.

CUSTOMER SUCCESS

Avoiding

Post-service follow-up is manual; no AI tools in use.

OPERATIONS

Experimenting

Office manager uses ChatGPT independently for follow-up emails. No approval or policy.

GROWTH

Avoiding

No AI tools observed for training, knowledge management, or strategic planning.

IT / TECHNOLOGY

LOGISTICS

Avoiding

No dedicated IT staff; owner manages the service-management software and QuickBooks directly. No AI tools in use.

Avoiding

Parts ordering is handled by phone and email with local suppliers. No AI-assisted procurement or inventory.

CURRENT AI USE

ChatGPT for customer follow-up emails	
BUSINESS FUNCTION	TOOL / VENDOR
Operations	ChatGPT
WHO IS USING	WORK SUPPORTED
Office manager	Composing follow-up emails after service calls and appointment reminders
PROCESS DOCUMENTED	IS IT HELPING?
Informal / primarily in one person's head	Yes
CREATING REWORK / PROBLEMS?	
No	
INFORMATION SHARED	
Non-sensitive business content only; no customer PII entered.	
APPROVED?	
No	
NOTES	
Office manager started using ChatGPT independently; no formal approval.	

Online lookup of error codes and wiring diagrams	
BUSINESS FUNCTION	TOOL / VENDOR
Delivery	Manufacturer websites / Google Search
WHO IS USING	WORK SUPPORTED
Field technicians	Diagnosing equipment faults and retrieving wiring diagrams on-site
PROCESS DOCUMENTED	IS IT HELPING?
No	Yes
CREATING REWORK / PROBLEMS?	
No	
INFORMATION SHARED	
No customer or business data shared; read-only public lookups.	
APPROVED?	

Yes

NOTES

Technicians have always done this informally; leadership considers it standard practice.

Drafting seasonal maintenance reminder copy

BUSINESS FUNCTION

Marketing

TOOL / VENDOR

ChatGPT

WHO IS USING

Office manager

WORK SUPPORTED

Writing email and postcard copy for spring AC and fall furnace maintenance promotions

PROCESS DOCUMENTED

No

IS IT HELPING?

Yes

CREATING REWORK / PROBLEMS?

No

INFORMATION SHARED

Non-sensitive marketing copy only; no customer data entered.

APPROVED?

No

NOTES

Ad hoc use only during seasonal prep; no customer data is entered.

Smarter Dispatch Scheduling

Operations · In Progress

OPPORTUNITY BEING ASSESSED

TITLE

Smarter Dispatch Scheduling

BUSINESS FUNCTION

Operations

OWNER

Maria Santos, Operations Manager

STATUS

Deferred

VALUE PROPOSITION

Save staff time

CURRENT FRICTION

Dispatch scheduling relies on a whiteboard and phone calls. Route changes for emergency calls disrupt the day plan.

DESIRED CHANGE

Suggest dispatcher-reviewed route adjustments using technician location, job duration, part readiness, and emergency priority.

SUCCESS INDICATOR

Average drive time per job drops 12%; first-call completion remains at or above 85%; no emergency call is deprioritized by AI without dispatcher approval.

AI'S ROLE

AI suggests route adjustments when emergency calls arrive. Dispatchers approve all changes before notifying technicians or customers.

ASSESSMENT

STATUS

In Progress

VERSION

LIGHTNING_1.0

STARTED

9/21/2026

READINESS PROFILE

Dimension	Status	Key Observation
Process	NEEDS ATTENTION	Dispatch changes are handled in real time by phone, whiteboard, and dispatcher judgment. Before AI can suggest route changes, the company needs documented rules for emergency priority, travel time, and customer communication.
Data & Information	NEEDS ATTENTION	Useful scheduling inputs span technician location, job duration, part availability, and customer urgency. Those fields are inconsistently captured, so the first pilot should be recommendation-only.
People & Training	NEEDS ATTENTION	Dispatchers understand tradeoffs better than the system. Training should frame AI as a route-suggestion assistant, with dispatcher approval before technicians or customers are notified.
Risk & Security	SIGNIFICANT CONCERN	Bad route changes can miss emergency calls, overpromise arrival windows, or strand technicians without the right parts. Human override and exception logging are required from day one.
Technology & Vendor	NEEDS ATTENTION	The current service-management platform does not provide AI dispatch optimization. Test with historical schedules and manual dispatcher review before connecting live routing data.

OVERALL INTERPRETATION

Dispatch optimization is worth investigating once job-note data is reliable. Route changes on emergency calls are the primary pain point — any AI assist must keep a human dispatcher in the approval loop during peak season.

QUESTION RESPONSES

PROCESS

We can explain how the current work is performed from beginning to end.	YES
The people involved generally perform the work in a consistent way.	YES
We understand what a good result looks like.	YES
We know where judgment, exceptions, or escalation are required.	YES
The process is documented well enough to support testing or improvement.	YES
We know who owns the process and who can approve changes to it.	YES

DATA & INFORMATION

We know what information the AI would need to perform this work.	PARTLY
We know where that information comes from and who owns it.	PARTLY
The information is accurate, complete, and usable enough for the intended purpose.	NO
We know what information would be shared with the AI and understand whether it is appropriate and permitted to share that information with the specific tool being considered.	NO
We understand whether customer, employee, financial, confidential, proprietary, regulated, or restricted information is involved.	PARTLY
We know what information should not be provided to the AI.	PARTLY

PEOPLE & TRAINING

The people involved are willing to try AI for this use case.	YES
They can learn how to provide useful instructions and context.	YES
The proposed AI use fits reasonably into how the work is performed.	YES
Someone involved has enough subject-matter expertise to evaluate the AI output.	PARTLY
We know what quality or accuracy is acceptable for this use case.	PARTLY
People understand that AI output may need to be challenged, corrected, or rejected.	PARTLY
It is clear who remains responsible for the final work or decision.	PARTLY
People understand when human review is required.	PARTLY

RISK & SECURITY

We know whether this use is internal, employee-facing, customer-facing, vendor-facing, or public.	YES
We know who will see, use, or rely on the AI output.	YES
We understand what could happen if the AI is wrong.	YES
We know when human review is required before the output is used.	PARTLY
We have or can establish acceptable-use boundaries for this use case.	PARTLY
We can document, when appropriate, what the AI did, what information it used, who reviewed it, and what action was taken.	PARTLY

We know who is responsible for identifying and responding to security or privacy concerns.	PARTLY
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TECHNOLOGY & VENDOR

We know which technology platforms and vendors touch this process or its information.	PARTLY
We know whether those vendors use AI in relevant features or services.	PARTLY
We understand what information may be sent to or processed by the AI service.	NO
We understand how information is stored, retained, or shared.	NO
We know whether information may be used to train or improve models or services.	NO
We know what controls are available, including whether AI features can be disabled or configured.	NO
We understand who has access to the data and what happens to it if we stop using the vendor.	NO
The proposed technology is a reasonable fit for the intended business use.	NO

OPEN QUESTIONS

What priority rules govern emergency calls versus scheduled maintenance appointments?	MEDIUM	OPEN
Which scheduling inputs are reliable enough for route recommendations today?	MEDIUM	OPEN
How will dispatchers log overrides and rejected suggestions?	MEDIUM	OPEN

ASSUMPTIONS

Dispatchers retain final approval over every route change.	UNVERIFIED
Initial pilot uses historical schedules and recommendation-only review.	UNVERIFIED
Customer notification remains manual until recommendation accuracy is proven.	UNVERIFIED

RISKS

Bad route suggestion delays an emergency call	OPEN
LIKELIHOOD	DECISION
Medium	Reduce
Technician is routed without needed parts or skill match	OPEN
LIKELIHOOD	DECISION
Medium	Reduce
Customer arrival window is overpromised after a route change	OPEN

LIKELIHOOD	DECISION
Medium	Reduce

CONSTRAINTS

Emergency priority and customer-notification rules must be documented before live routing.	OTHER	IDENTIFIED
Technician location, job duration, and part readiness are inconsistently captured.	OTHER	IDENTIFIED

ACTION ITEMS

Document dispatcher route-change rules and override reasons	GOVERNANCE	OPEN
Create historical schedule dataset for recommendation-only testing	PILOT PREPARATION	OPEN
Define part-readiness and technician-skill checks before route suggestions	GOVERNANCE	OPEN
Run dispatcher review of AI route suggestions for two peak weeks	PILOT PREPARATION	OPEN

BUSINESS OBJECTIVES

Reduce average drive time per job by 12% without lowering first-call completion
EXPECTED VALUE
Time Savings
Maintain first-call completion at or above 85% during dispatch pilot
EXPECTED VALUE
Quality Improvement

TEAM READINESS

Name	Role	AI Familiarity	Business Knowledge	Process Knowledge	Review Capability	Risk Awareness	Notes
Maria Santos	Operations Manager	—	—	—	—	—	—
Priya Nair	Office Systems /	—	—	—	—	—	—

Name	Role	AI Familiarity	Business Knowledge	Process Knowledge	Review Capability	Risk Awareness	Notes
	QuickBooks Admin						
Derek Walsh	Sales Manager / Quote Lead	—	—	—	—	—	—

AI ROLE ASSIGNMENTS

Role	Person	Notes
AI Sponsor	Maria Santos	—
Technical Lead	Priya Nair	—
AI Reviewer	Derek Walsh	—

OPERATING GUARDRAILS

Dispatchers must approve every AI-suggested route change before technicians or customers are notified.	HUMAN REVIEW	PROPOSED
Emergency calls cannot be deprioritized by AI without explicit dispatcher override.	OTHER	PROPOSED
Route suggestions must include part-readiness and technician-skill checks before review.	OTHER	PROPOSED

PILOT CHARTERS

Emergency calls disrupt whiteboard-based dispatch plans, increasing drive time and making arrival windows harder to keep.	DRAFT
USERS	
Operations manager, dispatcher, and field supervisors during peak-season scheduling review	
IN SCOPE	

Recommendation-only route adjustments from historical schedules and approved operational inputs

OUT OF SCOPE

Automated technician dispatch, automated customer notifications, emergency priority decisions without dispatcher approval

INFORMATION

Technician location, job type, estimated duration, part readiness, emergency priority, customer arrival window

WORKFLOW

1. Dispatcher exports schedule. 2. AI suggests route adjustments. 3. Dispatcher checks emergency priority, parts, and skills. 4. Approved changes are logged. 5. Customers are notified manually.

HUMAN REVIEW APPROACH

Dispatcher approval and override logging required before any operational change.

SUCCESS MEASURES

Drive time -12%; first-call completion $\geq 85\%$; no unapproved emergency deprioritization

RISKS SUMMARY

Emergency delay, missing parts, overpromised arrival windows, dispatcher overreliance

CONTROLS

Recommendation-only phase; dispatcher approval; override log; part and skill checks

OWNER

Maria Santos

DURATION

60 days

STOP CONDITIONS

Any delayed emergency from recommendation; first-call completion drops; dispatcher trust below 3/5

DECISION POINT

Day 30: adjust rules or continue. Day 60: integrate live data, defer, or stop.

Digital Job Notes & Callback History

Delivery · In Progress

OPPORTUNITY BEING ASSESSED

TITLE

Digital Job Notes & Callback History

BUSINESS FUNCTION

Delivery

OWNER

Derek Walsh, Sales Manager / Quote Lead

STATUS

Assessing

VALUE PROPOSITION

Improve product or service quality

CURRENT FRICTION

Technicians hand-write job notes on paper. Warranty details and callback history are hard to retrieve on the next visit.

DESIRED CHANGE

Structure technician notes into searchable service history so office staff and return-visit technicians can see symptoms, parts used, warranty status, and recommended follow-up.

SUCCESS INDICATOR

Callback rate drops 15%; next-visit diagnosis time reduced by 10 minutes; technicians complete structured notes without extending truck rolls.

AI'S ROLE

AI structures technician voice or text notes into searchable job records. Office staff review entries before they become customer-facing service history.

ASSESSMENT

STATUS

In Progress

VERSION

LIGHTNING_1.0

STARTED

9/21/2026

READINESS PROFILE

Dimension	Status	Key Observation
Process	READY TO INVESTIGATE	Technicians already capture job details verbally or on paper after service calls. AI can structure notes into symptoms, parts used, warranty status, and recommended follow-up before office review.
Data & Information	NEEDS ATTENTION	Job notes include customer addresses, equipment serial numbers, and warranty details. The pilot should use approved service records and avoid unmanaged voice-note tools.
People & Training	NEEDS ATTENTION	Technicians will need a short capture format that does not slow truck rolls. The service coordinator can review structured notes before they become customer-facing history.
Risk & Security	NEEDS ATTENTION	Incomplete notes can cause repeat visits or warranty disputes. AI should improve retrieval and structure, not decide diagnosis or warranty coverage without human review.
Technology & Vendor	NEEDS ATTENTION	Service records and paper notes are not yet connected to an enterprise AI tool. Start with a controlled mobile-note pilot before integrating deeply with service-management software.

OVERALL INTERPRETATION

Digital job notes are the highest-value starting point for this crew. Technicians already capture the information verbally — the gap is structure and retrieval, not willingness. A short pilot on return-visit jobs would validate whether structured notes reduce callbacks without slowing truck rolls.

QUESTION RESPONSES

PROCESS

We can explain how the current work is performed from beginning to end.	YES
The people involved generally perform the work in a consistent way.	YES
We understand what a good result looks like.	YES
We know where judgment, exceptions, or escalation are required.	YES
The process is documented well enough to support testing or improvement.	YES
We know who owns the process and who can approve changes to it.	YES

DATA & INFORMATION

We know what information the AI would need to perform this work.	PARTLY
We know where that information comes from and who owns it.	PARTLY
The information is accurate, complete, and usable enough for the intended purpose.	NO
We know what information would be shared with the AI and understand whether it is appropriate and permitted to share that information with the specific tool being considered.	NO
We understand whether customer, employee, financial, confidential, proprietary, regulated, or restricted information is involved.	PARTLY
We know what information should not be provided to the AI.	PARTLY

PEOPLE & TRAINING

The people involved are willing to try AI for this use case.	YES
They can learn how to provide useful instructions and context.	YES
The proposed AI use fits reasonably into how the work is performed.	YES
Someone involved has enough subject-matter expertise to evaluate the AI output.	PARTLY
We know what quality or accuracy is acceptable for this use case.	PARTLY
People understand that AI output may need to be challenged, corrected, or rejected.	PARTLY
It is clear who remains responsible for the final work or decision.	PARTLY
People understand when human review is required.	PARTLY

RISK & SECURITY

We know whether this use is internal, employee-facing, customer-facing, vendor-facing, or public.	YES
We know who will see, use, or rely on the AI output.	YES
We understand what could happen if the AI is wrong.	YES
We know when human review is required before the output is used.	PARTLY
We have or can establish acceptable-use boundaries for this use case.	PARTLY
We can document, when appropriate, what the AI did, what information it used, who reviewed it, and what action was taken.	PARTLY

We know who is responsible for identifying and responding to security or privacy concerns.	PARTLY
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TECHNOLOGY & VENDOR

We know which technology platforms and vendors touch this process or its information.	PARTLY
We know whether those vendors use AI in relevant features or services.	PARTLY
We understand what information may be sent to or processed by the AI service.	NO
We understand how information is stored, retained, or shared.	NO
We know whether information may be used to train or improve models or services.	NO
We know what controls are available, including whether AI features can be disabled or configured.	NO
We understand who has access to the data and what happens to it if we stop using the vendor.	NO
The proposed technology is a reasonable fit for the intended business use.	NO

OPEN QUESTIONS

What minimum note fields are needed for warranty, callback, and return-visit diagnosis?	MEDIUM	OPEN
Can technicians capture structured notes in under two minutes after a service call?	MEDIUM	OPEN
Which customer or equipment identifiers may be processed by the selected tool?	MEDIUM	OPEN

ASSUMPTIONS

Technicians will use a short capture template if it fits existing closeout workflow.	UNVERIFIED
Office staff can review structured notes before they become customer-facing history.	UNVERIFIED
The pilot starts on return-visit and warranty-sensitive jobs where note quality matters most.	UNVERIFIED

RISKS

Incomplete or wrong job note causes a repeat visit or warranty dispute	OPEN
LIKELIHOOD	DECISION
Medium	Reduce
Technicians skip notes if capture slows truck rolls	OPEN
LIKELIHOOD	DECISION
Medium	Reduce
Customer address or equipment serial data is processed in an unmanaged note tool	OPEN

LIKELIHOOD	DECISION
Medium	Reduce

CONSTRAINTS

Technician capture must fit job closeout and not delay emergency response.	OTHER	IDENTIFIED
Paper notes and service records are not yet connected to an enterprise AI workflow.	OTHER	IDENTIFIED

ACTION ITEMS

Define required structured job-note fields for callback-prone jobs	GOVERNANCE	OPEN
Pilot mobile note capture with two technicians on return-visit jobs	PILOT PREPARATION	OPEN
Create office review checklist for customer-facing service history	GOVERNANCE	OPEN
Review data handling for equipment serials and customer addresses	INVESTIGATION	OPEN

BUSINESS OBJECTIVES

Reduce callback rate by 15% for pilot job categories within 90 days EXPECTED VALUE Quality Improvement
Reduce next-visit diagnosis time by 10 minutes on return visits EXPECTED VALUE Time Savings

TEAM READINESS

Name	Role	AI Familiarity	Business Knowledge	Process Knowledge	Review Capability	Risk Awareness	Notes
Derek Walsh	Sales Manager / Quote Lead	—	—	—	—	—	—
Maria Santos	Operations Manager	—	—	—	—	—	—

Name	Role	AI Familiarity	Business Knowledge	Process Knowledge	Review Capability	Risk Awareness	Notes
Priya Nair	Office Systems / QuickBooks Admin	—	—	—	—	—	—

AI ROLE ASSIGNMENTS

Role	Person	Notes
AI Sponsor	Maria Santos	—
AI Champion	Derek Walsh	—
Technical Lead	Priya Nair	—

OPERATING GUARDRAILS

Office staff must review structured job notes before they become customer-facing records.	HUMAN REVIEW	PROPOSED
Technicians may use only the approved capture workflow for customer and equipment details.	DATA HANDLING	PROPOSED
AI may not decide warranty coverage or final diagnosis without human review.	HUMAN REVIEW	PROPOSED

PILOT CHARTERS

Paper job notes make warranty details and callback history hard to retrieve, increasing repeat visits and slowing return-visit diagnosis. USERS 2 technicians and office review staff for return-visit and warranty-sensitive jobs IN SCOPE	DRAFT
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Structured symptoms, parts used, warranty status, recommended follow-up, and callback history notes

OUT OF SCOPE

Warranty approval decisions, customer-facing diagnosis without review, dispatch routing

INFORMATION

Technician closeout notes, equipment model and serial, parts used, service history

WORKFLOW

1. Technician completes short capture template. 2. AI structures note. 3. Office staff reviews for completeness. 4. Record is saved to service history. 5. Return-visit tech retrieves summary.

HUMAN REVIEW APPROACH

Office review before notes become customer-facing history or warranty evidence.

SUCCESS MEASURES

Callback rate -15%; next-visit diagnosis time -10 minutes; capture time under two minutes

RISKS SUMMARY

Incomplete notes, warranty disputes, technician adoption friction, customer data handling

CONTROLS

Short template; approved tool; office review; warranty decision outside AI workflow

OWNER

Derek Walsh

DURATION

90 days

STOP CONDITIONS

Technician adoption below 70%; repeat note-quality failures; any customer data handling incident

DECISION POINT

Day 45: adjust template or continue. Day 90: expand to all service calls, integrate, or stop.

AI-Assisted Replacement Quote Generation

Sales · Completed

OPPORTUNITY BEING ASSESSED

TITLE

AI-Assisted Replacement Quote Generation

BUSINESS FUNCTION

Sales

OWNER

Maria Santos, Operations Manager

STATUS

Ready for Pilot

VALUE PROPOSITION

Reduce cycle time

CURRENT FRICTION

Preparing a replacement install quote requires 45–90 minutes of office staff time. Equipment specs, labor hours, and permit requirements are looked up manually across manufacturer sites and internal price sheets.

DESIRED CHANGE

Reduce quote preparation to 20–30 minutes by using AI to draft line items and labor estimates from a structured equipment brief. Office staff review and adjust every figure before sending to the customer.

SUCCESS INDICATOR

Average quote time drops from 75 minutes to ≤ 35 minutes. Close rate on replacement jobs maintained at $\geq 45\%$.

AI'S ROLE

AI generates a first-draft quote breakdown (equipment, labor, permits, optional add-ons) from a structured brief. Humans verify pricing and approve before customer delivery.

ASSESSMENT

STATUS

Completed

VERSION

LIGHTNING_1.0

STARTED

9/21/2026

COMPLETED

9/21/2026

READINESS PROFILE

Dimension	Status	Key Observation
Process	READY TO INVESTIGATE	The replacement quote workflow follows a clear sequence from site visit notes to customer delivery. Office staff understand each step. AI touchpoints can be defined at brief intake and first-draft line items.
Data & Information	NEEDS ATTENTION	Quotes contain customer names, addresses, and equipment details. Data handling is informal — no written policy on what can be entered into external AI tools. Vendor data retention must be confirmed before piloting.
People & Training	NEEDS ATTENTION	Sales and office staff are open to AI tools but rely on personal ChatGPT with no review protocol. Clear accountability for verifying AI-generated pricing is not yet defined.
Risk & Security	NEEDS ATTENTION	Customer PII appears in quote inputs. Inaccurate equipment or labor figures sent to customers create liability. Vendor security commitments must be validated before use.
Technology & Vendor	NEEDS ATTENTION	No enterprise AI tool is in place. Staff use personal ChatGPT accounts without data processing agreements. An enterprise solution with appropriate controls must be selected before piloting.

OVERALL INTERPRETATION

This opportunity is ready to investigate further. The quote workflow is well-defined and the team is willing. The primary gate is data governance — confirm what customer information can be shared with an AI vendor before selecting a tool. Risk mitigation steps (contract review, enterprise tool evaluation, review checklist) are concrete and can begin immediately. A structured 90-day pilot with two quote coordinators is the appropriate next step once the data question is resolved.

QUESTION RESPONSES

PROCESS

We can explain how the current work is performed from beginning to end.	YES
The people involved generally perform the work in a consistent way.	YES
We understand what a good result looks like.	YES
We know where judgment, exceptions, or escalation are required.	YES
The process is documented well enough to support testing or improvement.	YES
We know who owns the process and who can approve changes to it.	YES

DATA & INFORMATION

We know what information the AI would need to perform this work.	PARTLY
We know where that information comes from and who owns it.	PARTLY
The information is accurate, complete, and usable enough for the intended purpose.	NO
We know what information would be shared with the AI and understand whether it is appropriate and permitted to share that information with the specific tool being considered.	NO
We understand whether customer, employee, financial, confidential, proprietary, regulated, or restricted information is involved.	PARTLY
We know what information should not be provided to the AI.	PARTLY

PEOPLE & TRAINING

The people involved are willing to try AI for this use case.	YES
They can learn how to provide useful instructions and context.	YES
The proposed AI use fits reasonably into how the work is performed.	YES
Someone involved has enough subject-matter expertise to evaluate the AI output.	PARTLY
We know what quality or accuracy is acceptable for this use case.	PARTLY
People understand that AI output may need to be challenged, corrected, or rejected.	PARTLY
It is clear who remains responsible for the final work or decision.	PARTLY
People understand when human review is required.	PARTLY

RISK & SECURITY

We know whether this use is internal, employee-facing, customer-facing, vendor-facing, or public.	YES
We know who will see, use, or rely on the AI output.	YES
We understand what could happen if the AI is wrong.	YES
We know when human review is required before the output is used.	PARTLY
We have or can establish acceptable-use boundaries for this use case.	PARTLY
We can document, when appropriate, what the AI did, what information it used, who reviewed it, and what action was taken.	PARTLY

We know who is responsible for identifying and responding to security or privacy concerns.	PARTLY
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TECHNOLOGY & VENDOR

We know which technology platforms and vendors touch this process or its information.	PARTLY
We know whether those vendors use AI in relevant features or services.	PARTLY
We understand what information may be sent to or processed by the AI service.	NO
We understand how information is stored, retained, or shared.	NO
We know whether information may be used to train or improve models or services.	NO
We know what controls are available, including whether AI features can be disabled or configured.	NO
We understand who has access to the data and what happens to it if we stop using the vendor.	NO
The proposed technology is a reasonable fit for the intended business use.	NO

OPEN QUESTIONS

What customer information can we legally share with an AI vendor under our standard service agreements?	MEDIUM	OPEN
Which AI tools offer enterprise data handling commitments suitable for HVAC quote data?	MEDIUM	OPEN
How will we measure whether quote accuracy and close rates are maintained during the pilot?	MEDIUM	OPEN

ASSUMPTIONS

Office staff will review and adjust all AI-generated line items before sending quotes to customers.	UNVERIFIED
An enterprise AI tool with appropriate data controls is commercially available and affordable at our scale.	UNVERIFIED
Sales staff can provide structured equipment briefs with enough detail for useful AI drafts.	UNVERIFIED

RISKS

AI-generated quote includes incorrect equipment specs or labor hours	OPEN
LIKELIHOOD	DECISION
Medium	Reduce
Customer address or contact information is inadvertently shared with an AI vendor	OPEN
LIKELIHOOD	DECISION
High	Reduce

Staff skip the review step and send AI output without verifying pricing		OPEN
LIKELIHOOD	DECISION	
Medium	Reduce	

CONSTRAINTS

Service agreements may restrict sharing customer property details with third-party AI tools without explicit consent.		CONTRACTUAL	IDENTIFIED
Local permit and licensing requirements must be reflected accurately in every quote — AI output cannot replace code compliance review.		REGULATORY	IDENTIFIED

ACTION ITEMS

Review active service agreements for AI and third-party data sharing restrictions	INVESTIGATION	OPEN
Evaluate 2–3 enterprise AI tools for data privacy, security controls, and HVAC fit	INVESTIGATION	OPEN
Develop a human review checklist for AI-generated quote line items	GOVERNANCE	OPEN
Run a controlled pilot on five replacement quotes to measure time savings and accuracy	PILOT PREPARATION	OPEN

BUSINESS OBJECTIVES

Reduce average replacement quote preparation time from 75 minutes to ≤35 minutes within 90 days of pilot launch
EXPECTED VALUE
Time Savings
Maintain close rate on replacement jobs at ≥45% during and after the pilot period
EXPECTED VALUE
Quality Improvement

TEAM READINESS

Name	Role	AI Familiarity	Business Knowledge	Process Knowledge	Review Capability	Risk Awareness	Notes
Maria Santos	Operations Manager	—	—	—	—	—	—
Derek Walsh	Sales Manager /	—	—	—	—	—	—

Name	Role	AI Familiarity	Business Knowledge	Process Knowledge	Review Capability	Risk Awareness	Notes
Quote Lead							
Priya Nair	Office Systems / QuickBooks Admin	—	—	—	—	—	—

AI ROLE ASSIGNMENTS

Role	Person	Notes
AI Sponsor	Maria Santos	—
AI Champion	Derek Walsh	—
Technical Lead	Priya Nair	—

OPERATING GUARDRAILS

All AI-generated quote line items must be reviewed and approved by office staff before customer delivery.	HUMAN REVIEW	PROPOSED
No customer-identifying information may be entered into an AI tool without explicit management review.	DATA HANDLING	PROPOSED
AI vendors must provide a signed data processing agreement confirming no training on customer data before use.	VENDOR USE	PROPOSED

PILOT CHARTERS

Replacement install quotes require 45–90 minutes of manual lookup across manufacturer specs, labor sheets, and permit requirements. Peak season backlog delays customer responses.	DRAFT
USERS	
2 office quote coordinators (Maria Santos, Jen Rivera) for all replacement quotes in Q2	

IN SCOPE

First-draft generation of: equipment line items, labor hours, permit fees, optional IAQ add-ons

OUT OF SCOPE

Final pricing approval, financing terms, warranty legal language, dispatch scheduling

INFORMATION

Equipment model numbers, tonnage, labor rate tables, permit fee schedule — structured brief with no raw customer PII in AI inputs

WORKFLOW

1. Sales completes a structured 15-min equipment brief. 2. AI generates first-draft quote breakdown. 3. Office staff review and adjust (target: 20 min). 4. Sales manager approves. 5. Quote sent to customer.

HUMAN REVIEW APPROACH

Every AI-generated line item is verified against internal price sheets by office staff before the quote leaves the building.

SUCCESS MEASURES

Average quote time ≤35 minutes; close rate ≥45%; staff satisfaction ≥4 out of 5 at pilot close

RISKS SUMMARY

Pricing accuracy; customer data confidentiality; review step bypass during peak season

CONTROLS

Review checklist; anonymized briefs only; manager sign-off required; weekly pilot check-in

OWNER

Maria Santos

DURATION

90 days (Q2 peak season)

STOP CONDITIONS

Close rate drops below 40% for 2 consecutive weeks; customer complaint related to quote accuracy; any data security incident involving AI tool use

DECISION POINT

Day 45: assess average time savings and quote accuracy — continue, adjust, or stop. Day 90: decide to expand pilot, make permanent, or discontinue.