

# Bright Path Cleaning Services — Implementation Cheat Sheet

## What This Is

This document is your week-to-week reference for rolling out two AI applications. It's reminders, not reasoning — everything here was already discussed during your assessment. If you want the "why" behind a sequencing choice, a risk, or a piece of strategy, that lives in your full report; ask your guide and they'll pull it up.

### Phase sequence:

Phase	Application	Employee	Timing
Phase 0	Setup & pre-launch decisions	Maria	Before Phase 1
Phase 1	APP-2 — Client Relationship & Follow-Up Writing Assistant	Maria Gonzalez	Starts this week, 6 weeks guided practice
Phase 2	APP-1 — Bright Path Communications and Proposal Platform	Office Manager	Starts 2–3 weeks after Phase 1 close-out, 5 weeks guided practice

**Guide activation:** Your guide has the full context behind every item below — sequencing logic, risk detail, alternatives, strategic framing. If you hit something you're unsure about, ask rather than guess.

---

## Pre-Launch Decisions

Resolve all five before Phase 1 begins.

**Accountability Partner — APP-1.** Who checks in weekly (weeks 1–3) and once at week 5 on the Office Manager's use of the Communications and Proposal Platform. *Suggested: Maria Gonzalez.*

**Accountability Partner — APP-2.** Who checks in biweekly (weeks 1–4) on Maria's use of the Writing Assistant. *Suggested: Maria self-monitors, with an external check-in partner confirmed to ask hard questions.*

**Approval Pathway.** Confirm whether this implementation needs sign-off, budget authorization, or a leadership report before Phase 1 starts. *Suggested: Not applicable — Maria is sole decision-maker.*

**Peer Evidence.** Decide whether identifying a peer cleaning-business owner who's used an AI writing tool would help build confidence before APP-1 vendor evaluation. *Suggested: Worth doing.*

**Calendar Check.** Review the next 10–12 weeks for anything — personal absence, seasonal job surges — that would disrupt check-in rhythm or require adjusting start dates.

**Downstream Accountability.** Confirm Maria's bandwidth to steward APP-1 while she's still in her own learning curve on APP-2.

*Ask the guide about: "Walk me through the decision support detail for [Decision name] — what's the alternative profile, and how could it fail?"*

---

## Phase 0: Personal AI Entry Points

These run during the pre-launch window, alongside the decisions and checklists above. No close-out criteria, no gate — use as needed.

### Creating Templates

- "Create a template for a professional cleaning service estimate email with warm opening, service description, pricing placeholder, and next step."
- "Write a new client welcome email template — warm, not corporate — covering what to expect on the first visit and who to contact."

### Brainstorming

- "Five ways a small residential cleaning company could convert one-time deep clean customers into recurring weekly clients without a discount."
- "Low-cost ways to re-engage past clients who haven't booked in six months."

### Structure Documents

- "What should a complaint resolution protocol document include so any team member can follow it consistently?"

## Learning and Explaining

- "Explain 'customer lifetime value' for a small residential cleaning business and how to roughly calculate it."

*Ask the guide about:* "Show me the full Personal AI Entry Points library — I want more prompt ideas for [category]."

---

# PHASE 1 — APP-2: Client Relationship and Follow-Up Writing Assistant

**Employee:** Maria Gonzalez | Starts this week

## Platform Setup

Disable training data: Claude (Settings → Privacy → "Allow training on conversations" = OFF) or ChatGPT (Settings → Data Controls → "Improve the model for everyone" = OFF)  Create written rollout sequence document (APP-2 first, APP-1 timing, phase spacing)  Create written data boundary reference card, post at workstation  Create written two-step review checklist, post at workstation  Complete data boundary orientation using cleaning business examples (2–4 hrs, 1–2 sessions)  Complete brief self-paced prompt training (1 week, concurrent)

## Data Boundaries

**Approved:** Plain-language, conceptual descriptions — e.g., "a recurring biweekly client" or "a standard cleaning that went smoothly."

**Prohibited:** Client names, addresses, phone numbers, job notes, alarm codes, lockbox info, dollar amounts, or anything copied directly from Jobber, QuickBooks, or Gmail.

**Rule of Thumb:** If you need to copy-paste to explain it, describe it instead.

**Verification check:** After two weeks, Maria can state the boundary rule and name one prohibited category without consulting the card.

## Starter Prompts

**Recommended first use** — post-cleaning check-in:

"Write a warm post-cleaning check-in message for a recurring client. It was a standard biweekly cleaning, went smoothly. We'd love to know if everything looked good and if there's anything they'd like us to focus on next time."

Re-engagement:

"Write a warm re-engagement message to a client who hasn't booked in about four months. They were a regular biweekly client. Friendly and genuine, not salesy. Don't mention a discount."

Satisfaction check:

"Write a satisfaction check message for a new client after their second cleaning. We want to make sure they're happy and that service feels consistent with what they expected."

At-risk outreach:

"Help me draft an outreach message to a client who used to book every two weeks but has only booked once in the last two months. Warm and personal — valued, not chased. No hard sell."

## Review Protocol

Step 1 — Factual accuracy check  Step 2 — Tone check (does it sound like Bright Path: warm, direct, no corporate fluff)  Checklist posted at workstation; followed before any draft goes to a client

## Guided Practice Timeline

Week	What Happens
1–2	Verification checks: data boundary card adherence, two-step review checklist adherence
2	Capacity direction conversation — freed time directed to retention strategy and business growth work
3	Midpoint check — confirm 75%+ of scheduled check-ins completed; redirection check-in
3	Stall diagnostic available (see below)

4	Redirection check-in
6	Close-out evaluation (completion signal)
Monthly, after	Drift monitoring

**Stall diagnostic:** If drafts don't sound like Bright Path, revisit prompting approach before extending the timeline. At-risk outreach is the hardest component — if it stalls, keep using AI on easier components and return to at-risk once confidence builds.

## Capacity Direction

**Freed time goes to:** Retention strategy and business development work — designing the client segmentation approach and team accountability structures, not executing individual messages.

### Indicator questions (week 2 check-in):

- How many structured retention strategy conversations or planning sessions have you initiated this month that you wouldn't have had time for before?
- What's one specific decision about client retention you made this week that wasn't driven by an immediate crisis?

**If indicators are absent:** Explicitly authorize and schedule the redirected work — freed capacity needs a direct assignment, not general encouragement.

### Drift signals to watch:

- Maria mentions writing a check-in herself "because it was faster"
- At-risk outreach reverts to scratch drafting "because this client needed something special"

## Close-Out Criteria (Week 6)

Consistent tool use without boundary violations for two consecutive weeks  Maria can articulate why she did or didn't adjust a draft before sending  No data leakage incidents in reviewed prompt samples  Maria can describe the data boundary rule unprompted  Freed composition time confirmed actively directed to retention/growth work, not absorbed into operational tasks

**Decision:** Pass (all met) → Conditional (one named gap, reassess in 1 week) → Hold (extend 2 weeks)

**After close-out:** Accountability partner shifts to monthly check-ins. Stop condition for stewardship: two consecutive check-ins with nothing to correct, Maria can articulate reasoning unprompted.

*Ask the guide about:* "What's the strategic case for APP-2, and were there alternative approaches identified if this stalls?"

---

## PHASE 2 — APP-1: Bright Path Communications and Proposal Platform

**Employee:** Office Manager | Starts 2–3 weeks after Phase 1 close-out (vendor selection runs concurrently)

### Platform Setup

*Before vendor selection:*  Log into Jobber, explore email/campaign features before any external vendor search (1–2 weeks)  Confirm chosen vendor offers live chat or phone onboarding support (concurrent)

*Before first use:*  Confirm Gmail/Google Workspace API capability  Confirm Google Sheets export/API accessibility  Confirm Gmail data export capability for SaaS scenarios  Review vendor terms against three criteria: model training use, third-party sharing, post-closure data handling — do not proceed if any is unclear or unfavorable  Evaluate vendors against technical requirements: spreadsheet import, complete draft generation, brand voice adjustment  Confirm budget: \$50–\$150/month plus \$0–\$500 one-time setup  Set performance expectations: ~36% time savings at launch  Manual workflow orientation using test data (1–2 hrs)  Data migration and brand voice configuration for all seven communication types (2–3 weeks)  Output customization — verify drafts reflect brand voice before review begins  Create written two-step review checklist, post at workstation

### Data Boundaries

**System access:** Office Manager exports customer records from Jobber and pricing tiers from Sheets, uploads to the platform.

**What flows in:** Standard contact data and pricing — no alarm codes, access info, or other sensitive operational data, by design.

**What never gets manually overridden:** Complaint and special-request responses — these stay human-drafted regardless of platform capability.

**Vendor data checklist:** Confirm no model-training use, no third-party sharing, clear post-closure data handling. This is a standing check — repeat it if the vendor or plan tier changes.

**Verification check:** Maria confirms verbally she's reviewed vendor terms against the checklist before signing any trial.

## Initial Workflows

1. Confirm Jobber's native email/campaign features first — test whether they cover estimate proposals, follow-up sequences, and brand voice customization. If yes, skip external vendor search.
2. If an external vendor is needed: complete the technical requirements evaluation and budget confirmation above before any trial.
3. Export a test batch of Jobber records + Sheets pricing; run the manual workflow orientation with test data (not real customer data) first.
4. Complete brand voice configuration across all seven communication types before the first real estimate goes out.
5. After configuration, verify: do drafts sound like Bright Path, not "a price list with a logo"? Confirm before moving to real customer batches.

## Review Protocol

Step 1 — Factual accuracy check  Step 2 — Tone check against brand voice  Checklist posted at workstation; applies to every outgoing message from this application   
Complaint/special-request responses always human-drafted, never routed through this checklist as AI-originated content

## Guided Practice Timeline

Week	What Happens
1–2	Verification checks: vendor data checklist, two-step review checklist
2	Continuity check — confirm Phase 1 (APP-2) usage still holding
2	Capacity direction conversation — freed time directed to phone-based pipeline follow-up and onboarding coordination
3	Midpoint check — confirm 75%+ of scheduled check-ins completed; redirection check-in
5	Close-out evaluation (completion signal)

Monthly,      Drift monitoring  
after

**Stall diagnostic:** If brand voice is the issue, recalibrate platform voice parameters before extending the timeline. The complaint component is highest-judgment — defer it if it creates early friction.

## Capacity Direction

**Freed time goes to:** Phone-based pipeline follow-up on estimate requests, new client onboarding confirmation calls, staying ahead of scheduling changes.

### Indicator questions (week 2 check-in):

- How many phone-based estimate follow-up calls has the Office Manager made this week that she wouldn't have had time for before?
- How many new client first-booking confirmation calls has she completed this month?

**If indicators are absent:** Maria explicitly authorizes and schedules the redirected work.

### Drift signals to watch:

- Office Manager mentions drafting an estimate herself "because uploading felt like extra work"
- Saved AI drafts go unsent while manual versions go out instead

## Close-Out Criteria (Week 5)

Office Manager completes a full estimate-to-delivery cycle independently using real customer data  Adjusts at least one draft on brand voice grounds and can articulate why  Maria can state which three vendor data provisions she checked and the vendor's answers  Office Manager can describe both review steps from memory  Phase 1 (APP-2) usage confirmed still consistent — no regression  Freed writing time confirmed actively directed to phone-based pipeline follow-up and onboarding

**Decision:** Pass (all met, portfolio fully implemented) → Conditional (one named gap, reassess in 1 week) → Hold (extend 2 weeks)

**After close-out:** Accountability partner shifts to monthly check-ins. Full portfolio implementation is complete — focus shifts to foundation investment.

*Ask the guide about:* "What's the strategic case for APP-1, and what does the foundation investment roadmap look like after this closes out?"

---

## Post-Launch Monitoring Quick Reference

Use this table for the ongoing monthly check-in rhythm once both phases have closed out.

Check	APP-2 (Maria)	APP-1 (Office Manager)
Boundary/prompt adherence	Data boundary card refresh at 60 & 90 days	Vendor data checklist — re-check if vendor or plan tier changes
Review protocol holding	Review checklist adherence check at 30 days	Review checklist adherence check at 30 days
Capacity direction	Confirm time still going to retention strategy/growth work	Confirm time still going to phone-based pipeline follow-up/onboarding
Drift signals	Watch: self-drafting "because it's faster"; at-risk reverting to scratch	Watch: self-drafting "because uploading is extra work"; drafts saved but unsent
Prior phase continuity	—	Confirm APP-2 usage still consistent (checked at Phase 2 week 2)

---

## Guide Reference Index

These topics live in your full report, not here. Ask your guide directly.

Topic	When you might need it	Ask the guide
Workforce protection	Understanding how freed capacity protects a role, or you're seeing signs it isn't landing right	"Walk me through the workforce protection analysis for [APP name] — what was freed capacity designed to protect and what are the gaps?"

Strategic impact	Preparing a justification or want to connect an app to business goals	"What's the strategic case for [APP name] — how does it connect to our business goals and where does the match have limits?"
Alternative approaches	An application stalls or circumstances change	"Were there alternative approaches identified for [APP name]? What would pursuing one require?"
Foundation investment	Ready to think about what comes after this portfolio	"Walk me through the foundation investment roadmap — what are the gaps, what closes them, and what's the sequence?"
Regulatory	Confirming compliance obligations, or prepping for a board question	"What regulatory considerations were flagged in my assessment, and what should I do about them before or during implementation?"

*Confidential — prepared for Bright Path Cleaning Services © 2026 Confer with AI. All rights reserved. Prepared with AI assistance.*