

Small Business AI Readiness Questionnaire Response

Version: Updated to match new integrated Q9 format

Basic Info

1. **Company name:** Bright Path Cleaning Services
2. **Contact name:** Maria Gonzalez (Owner)**Contact email:** maria@brightpathcleaning.com
3. **Your vision summary:** Bright Path Cleaning Services exists to give homeowners and small business owners the peace of mind that comes from a consistently clean, well-cared-for space — delivered by a team they trust enough to hand over their keys. For that to be true, the business has to operate with enough reliability and professionalism that every client interaction, from the first estimate to the hundredth cleaning, reflects the same standard of care the crew brings to the work itself.
4. **Overall familiarity with AI (1-5):** Level 2 - Basic Exposure

"Some team members have tried ChatGPT or similar tools for simple tasks like writing emails or answering questions, but we haven't explored business applications as a company."

4b. Which implementation path fits where you are right now?

Option B — Conversational AI + Standalone Software Tools

Section 1: Business Overview (5-7 minutes)

5. **What is your primary business focus and main products/services?**

Residential cleaning services for homes and small offices in the greater metro area. Our main services include recurring weekly and biweekly cleaning, deep cleaning, move-

in/move-out cleaning, and occasional post-construction cleanup. About 75% of our revenue comes from recurring residential clients on weekly or biweekly schedules.

5b. Your Character

Our clients would tell you we're the company they stopped shopping around for. They'd say we show up when we say we will, we do the work the same way whether they're home or not, and if something isn't right, we make it right without being asked. A few of them have told me they recommend us by saying "they're the ones you can give your keys to and not think about it." That trust is the whole business.

From the inside, what my best people know is that I will never ask them to cut corners. If a job takes longer than we quoted, we finish it right — I'd rather lose margin on one visit than lose a client. My team also knows I'll go to bat for them with difficult clients. That loyalty goes both directions and it's why my turnover is low for this industry.

What I'm motivated to keep no matter what: every client communication should feel like it came from a person who knows them and cares about their home. Technology can help us write better and faster, but the voice has to stay ours — warm, direct, no corporate fluff. And scheduling, quality checks, and complaint resolution stay human. Those are relationship moments, not efficiency problems.

6. How many employees do you have and what are their main roles?

6 employees:

- Owner: Business management, sales, customer relations, quality checks
- Office Manager: Scheduling, customer communication, billing
- Team Lead: On-site crew supervision, training new cleaners, quality control
- 3 Cleaning Technicians: Direct cleaning services

7. What are your top two strategic business challenges?

- Converting one-time deep clean and move-out customers into recurring weekly/biweekly clients — we do great work but don't have a consistent follow-up system, so we lose people who would probably sign up if we stayed in touch
- Standing out from competitors when potential customers are comparing us to five other companies — our proposals and communications look basic compared to larger companies with marketing staff, even though our actual service quality is higher

8. What is your most important business goal for the next year?

Grow recurring client base by 25% while maintaining our current quality standards and customer satisfaction. We have capacity on our schedule for more recurring clients —

the bottleneck is converting leads and retaining new customers past the first few months.

Section 2: Current Operations (10-15 minutes)

9. Time-Consuming Tasks

TASK 1 (Q9A) - REQUIRED

TASK OVERVIEW

Task summary: Writing customer estimates, proposals, and follow-up communications

What this task involves: Responding to inquiry emails and website form submissions from potential customers, drafting estimates that explain our services and pricing clearly, writing follow-up emails when prospects don't respond, sending onboarding emails to new clients explaining what to expect, drafting thank-you messages after first cleanings, writing re-engagement emails to past clients we haven't heard from, composing responses to customer complaints or special requests

Performed by: Office Manager — 7 hrs/week

Time estimate confidence: High confidence estimate (discussed with employee doing the work)

Which component/part takes the most time or causes the most frustration? Every email gets written from scratch. We don't have templates for any of this — not for estimates, not for follow-ups, not for new client welcome messages. The Office Manager spends a long time trying to sound professional and get the right tone, especially for estimates where we're competing with other companies. She's great at scheduling and managing clients once they're booked, but writing polished sales-oriented communications isn't her strongest skill and it stresses her out. She'll sometimes spend 30 minutes on one estimate email that should take 10.

EMPLOYEE CONTEXT

Top strengths (select up to 3): Organization Communication Problem-solving

Interest in learning: Somewhat interested in learning

SOFTWARE USED IN THIS TASK

SOFTWARE 1: Jobber

What you use it for in THIS task: Looking up customer details, checking service history, referencing pricing for estimates

What data does this employee work with in this system for this task? Customer contact information, service addresses, service history, pricing schedules, job notes from previous visits

How organized is the data in this system: Very organized — Easy to find anything in under 2 minutes

Type: Cloud-based (accessible from web browser)

Admin access: Yes — I can add users, change settings, manage the account

Data export — can you download your data in a usable format (CSV, Excel) without contacting the vendor? Yes — confirmed by testing

Currently connects to other systems automatically: Yes — connects to: QuickBooks Online for invoicing

Subscription/version: Core plan

SOFTWARE 2: Gmail (Google Workspace)

What you use it for in THIS task: Drafting and sending all customer communications — estimates, follow-ups, welcome emails, complaint responses

What data does this employee work with in this system for this task? Customer email correspondence, estimate details drafted in the email body, follow-up history

How organized is the data in this system: Somewhat scattered — Takes searching to find things

Type: Cloud-based (accessible from web browser)

Admin access: Yes — I can add users, change settings, manage the account

Data export — can you download your data in a usable format (CSV, Excel) without contacting the vendor? Don't know

Currently connects to other systems automatically: No — I copy information manually between programs

Subscription/version: Google Workspace Business Starter

OTHER DATA SOURCES USED IN THIS TASK

DATA SOURCE 1: Pricing reference sheet

What this data is used for in this task: Looking up current pricing tiers by home size, service type, and add-ons when putting together estimates

Where is this data stored: Spreadsheets (Google Sheets)

Can you access and export this data in a usable format (CSV, Excel)? Not applicable (already in accessible format)

How organized is this data: Mostly organized — Usually know where to look

REGULATED DATA INVOLVED

Does this task involve any of the following? Check all that apply:

None of the above

TASK 2 (Q9B) - REQUIRED

TASK OVERVIEW

Task summary: Client quality follow-up and relationship management

What this task involves: Sending post-visit quality check-in messages to clients after each cleaning, following up on complaints and service issues until resolution is confirmed, identifying and reaching out to at-risk clients showing early warning signs (missed payments, reduced booking frequency, complaints), conducting satisfaction checks with new clients after their first three visits, managing lapsed client re-engagement outreach, and documenting visit notes and follow-up outcomes in Jobber after each client interaction.

Performed by: Owner (Maria) — 6 hrs/week

Time estimate confidence: High confidence estimate (this is a core part of my role and I track it closely because it directly affects retention)

Which component/part takes the most time or causes the most frustration? The volume is the problem. We have enough recurring clients that post-visit check-ins and follow-ups stack up across the week — I'll have four or five that need attention on any given day and I'm composing each one from scratch. The at-risk client outreach is the most stressful because I need to strike exactly the right tone — warm enough that they feel valued, direct enough that I'm actually addressing the issue. I'll spend 30-40 minutes on a single at-risk client message sometimes. Complaint follow-up is similar — I need to close the loop professionally and make sure the client feels heard, but every situation is different enough that I can't just copy a previous response. The post-visit check-ins are the highest volume and feel the most repetitive — I know what I want to say, I just end up saying it slightly differently every single time because I have no template.

EMPLOYEE CONTEXT

Top strengths (select up to 3): Relationship-building Problem-solving Initiative/self-direction

Interest in learning: Very interested in learning new skills

SOFTWARE USED IN THIS TASK

SOFTWARE 1: Jobber

What you use it for in THIS task: Checking job completion status to trigger follow-ups, reviewing visit notes and client history before reaching out, logging follow-up outcomes and client communication notes, identifying at-risk clients by reviewing booking patterns and complaint history

What data does this employee work with in this system for this task? Job completion records, visit notes from cleaning crews, client booking history and frequency, complaint and issue logs, client contact information

How organized is the data in this system: Very organized — Easy to find anything in under 2 minutes

Type: Cloud-based (accessible from web browser)

Admin access: Yes — I can add users, change settings, manage the account

Data export: Yes — confirmed by testing

Currently connects to: Yes — connects to: QuickBooks Online for invoicing

Subscription/version: Core plan

SOFTWARE 2: Gmail (Google Workspace)

What you use it for in THIS task: Drafting and sending all follow-up and relationship management communications — post-visit check-ins, complaint responses, at-risk client outreach, satisfaction checks

What data does this employee work with in this system for this task? Client email correspondence, follow-up message drafts, complaint resolution history

How organized is the data in this system: Somewhat scattered — Takes searching to find things

Type: Cloud-based (accessible from web browser)

Admin access: Yes — I can add users, change settings, manage the account

Data export: Don't know

Currently connects to: No — I copy information manually between programs

Subscription/version: Google Workspace Business Starter

OTHER DATA SOURCES USED IN THIS TASK

DATA SOURCE 1: Client satisfaction notes

What this data is used for in this task: Informal notes Maria keeps on individual client preferences, sensitivities, and relationship history to personalize follow-up communications

Where is this data stored: Spreadsheets (Google Sheets)

Can you access and export this data: Not applicable (already in accessible format)

How organized is this data: Mostly organized — Usually know where to look

REGULATED DATA INVOLVED

Does this task involve any of the following? Check all that apply: None of the above

10. Software Check - potential substitutions

Looking back at the software you listed in your tasks (Q9), do you have access to any OTHER software that could do similar work but you're not currently using?

None. We don't have any unused software subscriptions. Jobber has some email campaign features we haven't explored, but I'm not sure they'd help with the writing part — they'd just give us a different place to send emails from. We don't have a dedicated email marketing platform or anything like that.

11. Data Storage Alternatives

Looking back at where you said data is stored in Q9, do you have access to any OTHER storage systems that you're not currently using for this data?

None. Google Drive is where we keep documents and photos. Jobber holds customer data. We don't have other storage systems sitting around unused.

12. Do you use any cloud-based or online storage systems? If so, which ones?

Yes — Jobber for customer management and scheduling, QuickBooks Online for invoicing and bookkeeping, Google Workspace (Gmail, Google Drive, Google Sheets) for email and documents. Our website is hosted through Squarespace. Everything important is in the cloud, which is nice because I can check things from my phone when I'm doing quality checks at job sites.

Section 3: AI Potential (8-10 minutes)

13. AI and team

13a. What motivates you to explore AI for your business? What do you hope it changes about how your team works, and what role do you see AI playing alongside your employees?

Honestly, I'm tired of being bad at writing. I built this business because I'm good at cleaning, managing people, and building relationships with customers — not because I'm good at writing marketing emails or professional proposals. If AI could help me and my Office Manager produce better written communications faster, that alone would be worth it.

I also know we're leaving money on the table with our follow-up process. People request estimates, we send one, and if they don't respond, we might follow up once. Companies with dedicated sales staff follow up three or four times with professional-looking messages. We don't have a sales team — it's just me and my Office Manager trying to squeeze that in between scheduling and managing active clients.

I'd want AI strictly for the writing and content side. Our cleaning work, our customer relationships, our scheduling — that all stays human. When a client calls upset about something, I'm the one calling them back, not a computer. But if a computer can help me draft a better response to a Google review or write a promotional email that doesn't sound awkward? I'm interested.

13b. How would you describe your team's current feeling about AI becoming part of how they work?

Rating: 2 — Nervous

My Office Manager is cautious about new technology in general — it took her a few months to get comfortable with Jobber when we switched from paper scheduling. She'd need to see that it's actually easier, not just different. My cleaning crew doesn't care about office technology either way. It's really just me and the Office Manager who would use it, and I'd need to show her it's not going to make her job harder.

Your Answer: 2

14. Top Priority & Strategic Redirect

14a. Which ONE task from Question 9 would you most want to address with automation or AI tools?

Task 1: Writing customer estimates, proposals, and follow-up communications (Office Manager — 7 hrs/week)

Instructions: Select ONE task from Question 9 and explain your primary reason for prioritizing it.

This connects directly to our biggest business challenge — converting leads into recurring clients. Every estimate we send is a sales opportunity, and right now our estimates read like a price list instead of a professional proposal. Better follow-up communications would catch prospects who are interested but didn't respond to the first email. If our written communications were more polished and we had a consistent follow-up process, we'd convert more leads without needing to hire a salesperson. This is where the revenue impact would be clearest.

14b. If we freed up this time, what higher-value work could this employee focus on?

The Office Manager could spend more time on the front end of the client relationship — following up on estimate requests by phone, checking in with new clients after their first booking to confirm details and answer questions, and staying on top of scheduling changes or special requests before they become problems. Her real strengths are organization and problem-solving, not writing. She's great on the phone with clients and wonderful at juggling schedules — those relationship and coordination skills would be much better used keeping the pipeline moving and new clients feeling taken care of than staring at a blank email trying to figure out how to word a follow-up.

15. How do you currently make business decisions based on your data?

Mostly gut feel and whatever Jobber's dashboard shows me. I check revenue numbers in QuickBooks monthly. I know which clients are profitable and which aren't based on experience — I can tell you off the top of my head which houses take longer than they should. I look at how many estimate requests we're getting versus how many convert, but I track that loosely in my head rather than systematically. I know I should be more data-driven but I don't have time to sit down and analyze spreadsheets.

16. What concerns do you have about implementing AI in your business?

- Privacy — our clients trust us with access to their homes. Some of our job notes include alarm codes, lockbox combinations, pet information, client schedules (when they're home vs. away). I would never put that kind of information into an AI tool. That trust is everything in this business.
- Cost — we're a small operation and margins in cleaning aren't huge. I need something that pays for itself quickly, not a monthly subscription that eats into profit.
- Whether it will actually sound like us — we've built our reputation on being personal and friendly, not corporate. If AI makes our communications sound generic or robotic, that's worse than what we have now.
- My Office Manager's comfort level — if she can't figure it out in 20 minutes, she's not going to use it. It has to be genuinely easy.

17. Have you or your team tried any AI tools? If so, what has been your experience?

I tried ChatGPT once to write a social media post about our spring cleaning special. It was okay — the structure was better than what I would have written, but the tone was too formal and salesy for our brand. I didn't know how to fix that so I just rewrote it myself. Haven't tried it again for business, though I've used it a few times for personal things. My Office Manager hasn't tried any AI tools. Nobody else on the team would have reason to.

17b. Is there anything about the employees in your Question 9 tasks you'd want us to know before your first session?

My Office Manager is the one I'm most thinking about with all of this. She's excellent at her job — clients love her on the phone, she keeps our schedule running smoothly, and she problem-solves all day long without breaking a sweat. But the writing piece genuinely weighs on her. She knows the estimates go out slower than they should and she feels responsible when leads go cold, even though the real issue is that we never set her up with templates or tools to make that part easier. I don't want this process to feel like we're fixing something wrong with her — I want it to feel like we're finally giving her the right support for the one part of her role that was never a natural fit. She's cautious with new technology but once she trusts something, she's all in. The Jobber transition proved that. I just need to be thoughtful about how I introduce this so it lands as "here's something that makes your life easier" and not "here's one more thing you have to learn."

18. What do you plan to do with the report once you get it? (i.e., start a pilot project, use it to jumpstart further research, etc.)

Try one specific thing and see if it works. I'm not interested in a big technology plan — I want to test something small that saves real time, and if it does, I'll do more. If it doesn't, at least I'll understand the landscape better.

Section 4: Team Adaptation (5-7 minutes)

19. How comfortable is your team with change? (Select 1-5):

Level 2 - Change Novice: Cautious about change, needs proven results before committing, prefers guidance throughout transitions.

We adopted Jobber about two years ago and it was a rocky transition — my Office Manager was on paper scheduling before that and it took a solid two months before she stopped keeping a paper backup "just in case." But once she trusted it, she became the biggest advocate.

QuickBooks Online was easier because our bookkeeper set it up. We're not anti-change, but we need to see it working before we believe in it.

20. Looking at the inefficient processes from Question 9, which ONE of these causes the most stress or frustration for your employees, and why?

Task 1: Writing customer estimates, proposals, and follow-up communications (Office Manager — 7 hrs/week)

The Office Manager dreads writing estimates more than any other part of her job. She's told me she sometimes puts off responding to estimate requests because she doesn't know what to say, which means potential customers are waiting a day or two for a response when they've probably already contacted three other companies. She knows the delay costs us business and she feels guilty about it, but the writing just doesn't come naturally to her. Everything else she does — scheduling, client communication by phone, managing the cleaning crews — she handles confidently. The writing is the one thing that makes her feel inadequate, and it shouldn't, because it's not what we hired her for.

21. How do you currently handle employee training for new tools?

I learn it first, then I sit down with whoever needs to use it and walk them through it. No formal documentation — just me showing them and then being available for questions. When we adopted Jobber, I spent a weekend learning it, then spent two afternoons showing the Office Manager how to use it for scheduling. She took notes in a spiral notebook that she still references sometimes. If something is too complicated for me to figure out and teach, we probably won't adopt it.

22. What would help your team feel more confident about working with AI? (Check all that apply):

Hands-on training Seeing successful examples from similar businesses Step-by-step implementation guides Clear understanding of how it affects their role

23. How does your organization typically handle the implementation of major changes? (Select all that apply):

Top-down directives Ad-hoc approach

I decide we need to do something, I figure it out, and then I train whoever needs to use it. There's no committee or discussion process — it's a six-person cleaning company, not a corporation.

Section 5: Innovation Readiness (5-7 minutes)

24. Select your company's tech level (Select 1-5):

Tech Level 2 – "Uses essential digital tools like spreadsheets, cloud storage, and basic software but often struggles with integration. Hesitant about adopting new technology without clear guidance and support."

We use Jobber, QuickBooks, and Google Workspace, which is more software than a lot of cleaning companies our size. But nothing really connects to anything else except Jobber to QuickBooks for invoicing. I wouldn't say we struggle with the tools we have — we just use them at a basic level and haven't explored what else they can do.

25. What's your approximate monthly budget for NEW technology tools and software?

\$200 monthly

That's realistic but it's not comfortable. Cleaning margins are tight — a \$200/month tool needs to either save significant time or help us win enough new business to justify it. Free trials matter a lot to us because I need to see results before I commit.

26. Who would be responsible for implementing new technology solutions?

Part A — Who handles your technology? **Internal** - We find someone when needed — no established person; we'd go looking when something comes up

Part B — How capable are they with new tools and integrations? **Moderate** — handles standard IT well, limited experience with integrations or new platforms

Note: I handle all of our technology myself — I set up Jobber, I manage Google Workspace, and I keep things running day to day. If something was beyond me, I'd ask my nephew, who's good with computers, but that's informal — he's not someone we pay or have an agreement with. I can figure out most tools on my own but I'd need vendor support for anything involving integrations or more complex setup.

27. How do you prefer to learn about and test new business tools?

Show me how someone like me uses it for something I actually do. Not a generic demo — show me a cleaning company owner using it to write an estimate or respond to a review. Then let me try it with a real task. If I can produce something useful in the first 15 minutes, I'll keep going. I learn by doing, not by watching videos or reading manuals.

28. In the past 2 years, how has your organization responded to new technology initiatives? (Select 1-5):

2 - Cautious, slow adoption after proven success elsewhere

We adopted Jobber because three other cleaning company owners in my networking group were using it and loved it. I waited about six months after hearing about it before signing up. That's our pattern — we don't go first, but we don't wait forever either. Once we commit, we follow through.

Section 6: Data Security and Privacy (8-10 minutes)

Q29: Pre-Screen Confirmation

"Just to confirm: Your business does NOT provide licensed professional services (medical, legal, financial advisory) to clients, correct?"

Correct - we do not provide licensed professional services

We clean houses and small offices. We're licensed and insured as a cleaning business but that's a business license, not a professional services license like a doctor or lawyer.

Q30: Data Types Verification

"Looking back at the data types you checked in Q9 for your tasks, does your business regularly collect, store, or process ANY of the following regulated data? Check all that apply:"

None of the above

We have customer names, addresses, phone numbers, and email — standard business contact information. Payment is handled through Jobber's payment processing and QuickBooks. We don't store credit card numbers ourselves. We do have sensitive information in our job notes (alarm codes, lockbox combinations, pet details, client schedules) but that's operational notes in Jobber, not regulated data in the legal sense.

Q31: AI Data Access Intent

"Thinking about the AI tools you want to implement, will they need to directly access, read, or process any of the following types of information?"

None of the above - AI will only work with general business information

AI would help with writing — estimates, follow-ups, marketing content, review responses. It would not need access to customer addresses, alarm codes, payment information, or any of the sensitive operational details we keep in Jobber. The writing tasks are about what we say and how we say it, not about specific client data.

Q32: Current Data Practices

"How do you currently handle sensitive business information?"

Specialized industry software (Jobber) General cloud storage (Google Drive)

Additional context: Customer information and job details (including sensitive notes like alarm codes and access instructions) are in Jobber, which requires login credentials and has role-based access. Financial records are in QuickBooks Online. General documents and photos are in Google Drive. We don't have formal security policies but we're careful — only I and the Office Manager have access to Jobber admin functions, and we never share client access information outside the crew assigned to that home.

Q33: Client-Facing AI Intent

"Will any AI tools you implement interact directly with YOUR customers?"

No, AI is only for internal operations

Absolutely not. Our clients hire us because they trust us personally — Maria's company, not some automated service. Every customer communication comes from a real person. AI might help us write better emails, but my Office Manager or I will always be the ones sending them

and handling the conversation. In this business, the personal touch isn't optional — people are literally giving us keys to their homes.

PHASE 3: REVIEW AND SUBMISSION (5-10 minutes)

Before Submitting - Please Verify:

CRITICAL ITEMS TO VERIFY:

Q9 VERIFIED: I confirmed both tasks with the employee doing them

- Hours are high-confidence estimates from Office Manager (Task 1) and my own estimate (Task 2)
- All roles involved are included
- Task descriptions are specific and accurate

Q10 COMPLETE: No alternative software available — we're using what we have

Q19 ACCURATE: I discussed change comfort with my Office Manager — based on Jobber adoption experience showing cautious but ultimately successful approach

Q24 ACCURATE: I read all 5 tech level descriptions twice and selected based on current state (digital tools without integration, basic usage)

Q25 AUTHORIZED: Budget number is for NEW tools (\$200/month), comes from me (owner), reflects what I can justify given current margins

All information provided is accurate to the best of my knowledge

I have not included any confidential or sensitive information

Wrapping Up

Do you have any feedback on using this questionnaire? (time, clarity, preparation process, etc.)

It was pretty straightforward. The questions about regulated data made me think carefully about what we actually have that's sensitive — I hadn't really thought about alarm codes and client schedules as "sensitive data" before, but of course they are. Good to think about that before putting anything into a new tool. Took me about 30 minutes.

Thank you for taking the time to complete this assessment!

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