
BLUEPRINT AI

AI Operations Blueprint

A focused operational review identifying where AI, automation, and better systems can create measurable leverage inside your business.

Note: This is a sample engagement deliverable. The business described is fictional, but the methodology, analysis structure, and level of detail reflect what every Blueprint AI client receives.

PREPARED FOR

Apex Commercial Cleaning

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EXECUTIVE SUMMARY

The Business at a Glance



Apex Commercial Cleaning is a well-run business with strong client relationships and steady revenue growth. Mike Torres has built something real — 47 employees, 38 active contracts across office buildings, medical facilities, and retail spaces, and a reputation that drives most new business through referrals.

The problem isn't the business. The problem is that the systems underneath it haven't kept up with the growth. What worked at \$1M in revenue is now creating drag at \$3.2M. Scheduling lives in a spreadsheet. Client communication happens through personal text messages. Quality inspections are inconsistent. Invoicing requires manual entry from paper timesheets.

None of these are catastrophic on their own. Together, they cost Apex an estimated **22–26 hours per week** in avoidable manual work and create operational risk that increases with every new contract signed.

An important distinction: Apex's team already uses some AI tools — ChatGPT for drafting client emails, a basic scheduling app on phones. But using individual AI tools is not the same as having AI systems. Tools help one person with one task. Systems connect every tool to a single source of truth so the entire operation runs cleaner. This report focuses on systems, not tools.

Key Findings

- **Scheduling and dispatch** is the single largest time drain. Mike and his operations manager spend ~8 hrs/week managing shift coverage, last-minute callouts, and route changes in a shared Google Sheet.
- **Client communication has no system.** Service requests, complaints, and check-ins happen via Mike's personal phone. Nothing is logged. Follow-up depends on memory.
- **Quality control is reactive, not proactive.** Inspections happen only after complaints. No systematic way to verify job quality across 38 sites.
- **Invoicing takes 6+ hours per billing cycle.** Paper timesheets, manual QuickBooks entry, cross-referencing contract rates. ~8% of invoices require correction after sending.
- **Employee onboarding is informal.** New hires shadow experienced cleaners with no checklist, no tracking, no consistency.

Bottom line: Apex is doing \$3.2M in revenue on infrastructure built for \$1M. AI and automation won't fix everything — but applied to the right problems, they can recover 20+ hours per week and reduce the operational risk that comes with scaling on manual processes.

OPERATIONS AUDIT

Where Time and Money Are Being Lost

This section maps every process where manual effort, redundant steps, or missing systems are costing Apex time, money, or both. Findings come from on-site observation, interviews with Mike, his operations manager (Dana), and three team leads, and a review of the tools currently in use.

Note: Not every operational area below will map directly to your business. The structure of a Blueprint engagement is consistent — loss map, prioritized opportunities, automation boundaries, phased roadmap — but the specific findings are always tailored to what we observe inside your operation.

1. Scheduling & Dispatch

Current state: Scheduling for 47 employees across 38 sites is managed in a shared Google Sheet. Mike and Dana build the weekly schedule manually every Sunday night, accounting for PTO, site requirements, and employee certifications. When someone calls out (3–5 times per week), they scramble through text messages to find coverage.

Weekly time lost	Risk level	Automation readiness
10–11 hrs/week	HIGH — directly impacts client retention	HIGH — clear rules, structured data

2. Client Communication

Current state: All client communication runs through Mike's personal cell phone. Service requests, schedule changes, complaints, and check-ins all come in as texts or calls. Nothing is logged. If Mike is unavailable, messages wait. Three contracts in the last year were nearly lost because follow-ups fell through the cracks.

What it costs: ~5 hours/week of Mike's time on reactive communication, plus a single point of failure — if Mike is sick or on vacation, client communication stops entirely.

3. Quality Control & Inspections

Current state: Quality checks happen only when a client complains. No routine inspection process, no scoring system, no documentation. Apex's average contract is worth \$84K/year. Two contracts were lost last year with quality cited as a factor — that's \$168K in revenue from a preventable problem.

4. Invoicing & Timekeeping

Current state: Paper timesheets → manual QuickBooks entry → cross-reference against contract rates → generate invoices. 6–8 hours per billing cycle. ~8% error rate on invoices, which damages client confidence. Late invoices (avg 4 days past target) delay cash collection.

PRIORITIZED OPPORTUNITIES

What to Build — Ranked by Impact

Not everything should be automated. The opportunities below are ranked by time recovered, risk reduced, and implementation feasibility. Items at the top deliver the most value with the least complexity.

#	Opportunity	Time Saved	Complexity	Phase
1	Automated scheduling & callout coverage	10–11 hrs/wk	Medium	Phase 1
2	Digital timesheets → auto-invoicing	6–8 hrs/cycle	Low	Phase 1
3	Client communication hub (shared inbox)	5 hrs/wk	Low	Phase 1
4	Mobile QC inspection checklists + photos	—	Medium	Phase 2
5	AI-generated monthly client reports	3 hrs/mo	Medium	Phase 2
6	Employee onboarding workflow + checklists	4 hrs/hire	Low	Phase 2

Integration note: Apex currently uses Google Workspace, QuickBooks, and personal phones. Every system recommended above is designed to integrate with or replace specific parts of that existing stack — not add a new layer on top of it. Where possible, we build on tools the team already knows. Where existing tools are the bottleneck (paper timesheets, the Google Sheet schedule), we replace them with purpose-built alternatives that connect directly to QuickBooks and Google Calendar.

AUTOMATION BOUNDARIES

What Should NOT Be Automated

This is as important as the opportunity list. Automating the wrong things wastes money and can damage client relationships.

- **Client relationship management.** Mike's personal relationships with building managers are Apex's moat. AI handles logistics and reporting — the trust-building conversations stay with Mike.
- **Hiring decisions.** AI can streamline applications and flag candidates. The final call requires human judgment about reliability and team fit.
- **Contract negotiation and pricing.** AI surfaces data to inform pricing (cost per sq ft, margin analysis). The negotiation requires reading the room.
- **Conflict resolution.** When a client is upset or an employee has a grievance, a human handles it. AI logs the issue and routes it — the conversation is human-only.

The goal is never to replace Mike's judgment — it's to free up his time so he can spend more of it on the things that actually require his judgment.

IMPLEMENTATION ROADMAP

Phased Plan with Cost Estimates

Implementation happens in two phases. Phase 1 addresses the highest-impact, lowest-complexity opportunities and goes live within 3–4 weeks. Phase 2 builds on Phase 1's infrastructure and adds intelligence layers.

Why these costs are lower than enterprise software: These aren't off-the-shelf SaaS products with per-seat pricing. They're custom systems built specifically for how Apex operates — no unnecessary features, no bloated interfaces, no \$200/seat/month subscriptions. You own the systems outright.

Phase 1 — Foundation (Weeks 1–4)

System	Build Cost	Monthly	What It Replaces
Smart scheduling + auto-callout coverage	\$4,500–6,000	\$150/mo	Google Sheet + frantic Sunday night planning
Digital timesheets → auto-invoice pipeline	\$2,500–3,500	\$80/mo	Paper timesheets + manual QuickBooks entry
Shared client inbox + activity logging	\$1,500–2,500	\$60/mo	Mike's personal phone as only comm channel

Phase 1 Total **\$8,500–12,000 build + ~\$290/mo ongoing**

Projected Monthly Return

	Month 1	Month 2	Month 3	Month 4+
Hours recovered/wk	12–15	18–21	21–24	24+
Value at \$45/hr	~\$2,400	~\$3,600	~\$4,300	~\$4,300+
Cumulative savings	\$2,400	\$6,000	\$10,300	\$14,600+

Phase 1 build cost (\$8,500–12,000) is fully recovered by month 3–4 based on time savings alone — before accounting for revenue protection from fewer dropped balls.

Phase 2 — Intelligence Layer (Weeks 5–8)

System	Build Cost	Monthly	What It Replaces
Mobile QC app with photo verification	\$3,000–4,500	\$100/mo	No inspection process (reactive complaints only)
AI-generated monthly client reports	\$2,000–3,000	\$40/mo	No proactive reporting
Employee onboarding workflow + tracking	\$1,500–2,000	\$30/mo	Informal shadowing, no documentation

Phase 2 Total **\$6,500–9,500 build + ~\$170/mo ongoing**

Total Investment

	Build (one-time)	Ongoing (monthly)
Phase 1	\$8,500–12,000	~\$290/mo
Phase 2	\$6,500–9,500	~\$170/mo
Combined	\$15,000–21,500	~\$460/mo

Projected annual value: 24+ hours/week recovered (~\$50,000/year in capacity), reduced contract churn risk (protecting \$84K+ per contract), faster invoicing (improving cash flow by 4–7 days per cycle), and a quality management system that turns client retention from reactive to proactive.

AFTER THE BUILD

Ownership, Support, and What Happens Next

A system is only as valuable as its reliability after launch. Here's how Blueprint AI handles the transition from build to operations:

You Own Everything

Every system built in a Blueprint engagement belongs to you. Source code, databases, integrations, documentation — all of it. Nothing is locked behind a proprietary platform or a subscription to my services. If we part ways after Phase 1, you walk away with fully functional systems and complete documentation. No vendor lock-in.

Documentation and Training

Every system ships with written documentation covering how it works, how to use it, and what to do if something goes wrong. Before handoff, I do a walkthrough with the team members who'll use each system daily. Dana doesn't need to understand the code — she needs to know what buttons to press and what the alerts mean.

Ongoing Support

After launch, Blueprint AI offers a support retainer (\$1,500–\$3,000/month depending on scope) that covers monitoring, bug fixes, minor adjustments, and priority response when something breaks. This is optional — the systems are built to run independently — but most clients keep it for 3–6 months while the team gets comfortable. After that, many scale down to as-needed support at an hourly rate.

Data Security

All systems are built within your existing infrastructure (or infrastructure you control — your database, your accounts, your API keys). Client data, employee data, and financial records never pass through Blueprint AI's servers. Access credentials are documented and transferred to you at project close. My background in mortgage lending — 13 years handling regulated financial data under RESPA, TILA, and ECOA — means data discipline isn't a talking point for me. It's how I've always worked.

NEXT STEPS

How to Move Forward

This blueprint is the starting point, not a binding proposal. The next step:

- **Schedule a walkthrough.** A 45-minute working session to review these findings together, pressure-test the priorities, and agree on Phase 1 scope.
- **Finalize scope and timeline.** We lock in exactly what's being built, the integration points with your existing tools, and the delivery dates.
- **Build.** Phase 1 systems go live within 3–4 weeks. You see working software, not status reports.

No long-term contracts. No retainer required to start. Phase 1 is scoped, quoted, and delivered as a standalone engagement. If the systems work and you want to continue to Phase 2, we do. If not, you keep everything that was built and we shake hands.

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