BUSINESS BRAIN · HANDOFF PACK

Everything your business knows, ready for AI.

Built for Brightline Heating & Air. Your services, prices, policies and answers, packaged once and loaded into the tools your team already uses.

01 Your setup at a glance
02 What your AI knows
03 Test report: 50 question test
04 Ownership & access
05 30-day results
06 Keeping it current

Brightline Heating & Air

Prepared by Open Arm Solutions · Delivered October 2026

SAMPLE · FICTIONAL BUSINESS

01 · YOUR SETUP AT A GLANCE

Your Business Brain is live in 4 places.

Your services, prices, policies and answers, packaged once and loaded into the tools your team already uses.

64	22	11	96%
Customer questions answered	Services & prices	Policies & rules	Handoff test pass rate

Where it's set up

TOOL	WHO USES IT	WHAT IT DOES	STATUS	LAST UPDATED
ChatGPT project	Office team	Drafts replies, estimates and follow-ups in your voice	Live	Nov 3, 2026
Website chat	Customers	Answers questions day and night and books tune-ups	Live	Nov 3, 2026
Phone answering	Callers	Answers missed calls, texts back, takes job details	Live	Nov 3, 2026
Technician text line	Field techs	Answers "what's our policy on..." from the van	Live	Nov 3, 2026

Business Brain master file last updated Nov 3, 2026.

How it connects

Business Brain
Set up once, in your accounts

→

- ChatGPT project
- Website chat
- Phone answering
- Technician text line

Start using it today

1. Ask your Business Brain

Ask a question a customer asked this week.

2. Update a price or service

Text or email us the change and the date it starts.

3. Read your test report

Start with the pass rate and results by topic.

02 · WHAT YOUR AI KNOWS

Every answer is written the way you'd say it.

Each entry holds the facts, the words to use, and when to hand off to a person.

AC tune-up

FACTS

$129 per system; $99 for a second system on the same visit. 21-point check, coil rinse, refrigerant check. About 60 minutes. Comfort plan members get two a year free.

HOW TO SAY IT

> *"Our tune-up is $129 and takes about an hour. If you join our comfort plan, two tune-ups a year are included. Want me to find you a time this week?"*

HAND OFF TO A PERSON WHEN

The customer reports no cooling at all, or water near the unit. Treat it as a service call, not a tune-up.

NEVER SAY

An exact arrival time, or a price for repairs found during the tune-up.

Emergency after-hours calls

FACTS

After 6 p.m. and on weekends: $189 dispatch fee, waived if the repair is approved. The on-call tech is reached by text, with a 30-minute callback target.

HOW TO SAY IT

> *"I can get our on-call technician to call you back within about 30 minutes. There's a $189 after-hours fee, and it's waived if you go ahead with the repair."*

HAND OFF TO A PERSON WHEN

Gas smell, smoke or sparks: tell the caller to leave the home and call 911, then alert the owner immediately.

NEVER SAY

That a gas smell or sparks can wait, or a repair price before the tech has seen it.

Also inside: Comfort plan, Furnace tune-up, Service calls, Duct cleaning, New system estimates, Financing, Warranties, Brands, Booking windows, Safety rules.

03 · TEST REPORT

We tested it with 50 questions based on what people search for.

The business is fictional, so the questions are based on what people search for. 48 passed on the first run; the 2 misses were fixed and re-tested.

50	48	2	96%
Questions tested	Passed first time	Fixed & re-tested	First-run pass rate

QUESTION ASKED	ANSWER GIVEN	SOURCE	RESULT
What's your financing rate?	First run quoted a rate. Now: rates come from the lender; the advisor explains at the estimate.	Financing rule	Fixed
Do you service Lennox units?	First run said "not sure." Now: yes, all major brands, including Lennox.	Brands list	Fixed
How much is a tune-up?	$129 per system, about an hour; free twice a year for comfort plan members.	Price list, p.2	Pass
Is a second system cheaper?	$99 for a second system on the same visit.	Price list, p.2	Pass
How much is a furnace tune-up?	$119, about an hour, with a carbon monoxide check.	Price list, p.2	Pass
What does a service call cost?	$89 diagnostic, waived if you approve the repair.	Price list, p.1	Pass
Do you charge for a new-system quote?	No. In-home estimates for new systems are free.	Price list, p.3	Pass

Showing 7 of 50, misses first. Every row is in your test report and your portal.

Results by topic



04 · OWNERSHIP & ACCESS

Your accounts and files are yours: each one, who owns it, and where it lives.

Every account is in your name. We have helper access only, and you can remove it any time without breaking anything.

WHAT	ACCOUNT OWNER	OUR ACCESS	WHERE TO FIND IT
Business Brain master file	Brightline (Google Drive)	Editor, removable	Drive › Brightline AI › Business Brain
ChatGPT project	Brightline Team plan	None	ChatGPT › Projects › Brightline
Website chat	Brightline website account	Admin, removable	Website settings › Chat
Phone answering app	Brightline, billed to your card	Admin, removable	App dashboard › Assistant
Technician text line	Brightline phone number	None	Phone app › Shared inbox
Editable copies (Word, Google Docs)	Brightline	None	Portal › Files

Every file we handed over

FILE	FORMAT	WHERE IT IS
Business Brain master file	Word + Google Docs	Drive › Brightline AI
Tool instructions (4 tools)	PDF	Portal › Files

Also yours: the handoff pack, the test report, this sheet and the 30-day results report, each as a PDF and an editable Word file, in your portal.

If you ever leave

Everything keeps working. Remove our access where it says "removable". We delete your portal within 30 days of your request or plan ending.

Who to contact

hello@openarmsolutions.com or text (954) 821-2598. We usually reply the same business day.

05 · 30-DAY RESULTS

Your first month with the Business Brain.

Illustrative numbers for a sample business. Your real report is built from your own logs 30 days after launch.

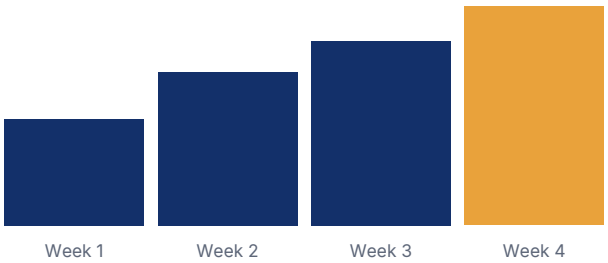
212
Customer questions answered

37
Missed calls caught & texted back

14
Bookings from chat & text

3
New answers added

Questions answered per week



Top questions this month

Tune-up price and booking	48
After-hours / emergency	31
Financing on new systems	22
Brands serviced	17
Duct cleaning	9

What we changed & next month's plan

Added
3 new answers about duct cleaning, asked 9 times with no answer.

Updated
Fall tune-up special loaded into all 4 tools on the day it started.

Next
Turn the 14 chat bookings into automatic reminder texts.

06 · KEEPING IT CURRENT

When something changes, it changes everywhere.

When prices, hours, services or policies change, these three steps keep every answer right.

KEEP IT RUNNING

Active · renews Dec 2

Price and policy updates, fixes, and a monthly check with a short report. Text or email any change.

To request a change

1. **Text or email us** at (954) 821-2598 or hello@openarmsolutions.com: what changed and from when.
2. **We update it once** and every tool gets the new answer. On Keep It Running, small changes are included.
3. **We confirm** by reply, with the questions we re-tested.

How-to guides

Ask your Business Brain · 2 min

1. Ask a question a customer asked this week. 2. Check the source it names. 3. Tell us if an answer is off.

Update a price or service · 1 min

1. Text or email us the change and the date it starts. 2. We update the master file and every tool. 3. We reply with the re-tested questions.

Read your test report · 2 min

1. Start with the pass rate and results by topic. 2. Check the misses: each one says what we fixed. 3. Ask us about any answer you'd word differently.

Where things stand

STEP	DETAIL	STATUS
Setup questionnaire	Received Sep 24	Done
Business Brain built & tested	Tested before handoff	Done
Loaded into 4 tools	Live Oct 2	Done
30-day results report	Sent Nov 3	Done