Business Brain workbook

Everything your team, and your AI tools, need to answer customers the way your best person would. The blue writing is a filled-in example for a sample HVAC company.

Write it like you'd say it

Plain sentences beat bullet fragments. AI tools copy your tone.

Prices with their exceptions

A price plus what changes it is what stops wrong answers.

Say when to hand off

Every answer the AI shouldn't give goes to a person, by name.

Never include: customer names or contact details, card or bank numbers, Social Security numbers, passwords or door codes, health information, or anything your contracts say is confidential.

The seven sections

SECTION	WHAT GOES IN	TIME
1 · The basics	Who you are, where you work, hours, how to reach you	10 min
2 · Services and prices	Every service, its price and what changes it, in your words	30 min
3 · Policies	Booking, cancellations, payment, warranties	15 min
4 · Top questions	The 20 questions customers ask most, with your answers	30 min
5 · How things get done	Your key processes as numbered steps	45 min
6 · Voice and limits	Your words, and what goes to a person	15 min
7 · Keeping it current	Who owns it, and when it's checked	5 min

How to fill it in

1. Read the blue example in each section first: it shows the level of detail that makes AI answers good.
2. Fill in the blank boxes under it, in Word or by hand. Plain sentences are fine.
3. Do one section at a time. Most businesses finish in two or three sittings.
4. Save the finished workbook as one file: that file is your Business Brain.

SECTION 1 · THE BASICS

Who you are and how to reach you

Every answer leans on these facts, so keep them short and exact.

BUSINESS NAME (AND NAMES CUSTOMERS USE)

Brightline Heating & Air. Customers also say "Brightline" or "Brightline HVAC".

WHAT YOU DO, IN TWO SENTENCES

We repair, maintain and replace heating and cooling systems for homes and small offices. We also install smart thermostats and clean ducts.

WHERE YOU WORK

Homes and offices within about 25 miles of our shop: Northgate, Lakeview, Millbrook and the towns between.

HOURS

Mon–Fri 7 a.m.–6 p.m., Sat 8 a.m.–2 p.m. Emergency calls 24/7 (after-hours fee applies).

HOW CUSTOMERS REACH YOU, AND HOW FAST YOU REPLY

Call or text (555) 014-2290, or book at brightlinehvac.example. Texts answered within 15 minutes during hours.

Your answers

BUSINESS NAME (AND NAMES CUSTOMERS USE)

HOW CUSTOMERS REACH YOU, AND HOW FAST

WHAT YOU DO, IN TWO SENTENCES

WHERE YOU WORK

HOURS, INCLUDING HOLIDAYS

SECTION 2 · SERVICES AND PRICES

One box per service

If a price depends on the job, say what it depends on and the range you're comfortable saying out loud.

SERVICE NAME
What customers call it, not your internal code.

AC tune-up

PRICE & WHAT CHANGES IT

$129 per system. Second system on the same visit $99. Free for comfort plan members (2 a year).

HOW LONG IT TAKES

About 60 minutes per system.

WHAT'S INCLUDED

21-point check, outdoor coil rinse, refrigerant level check, filter swap if the customer has one ready.

THE WAY YOU'D SAY IT ON THE PHONE
Write it exactly as your best person would say it.

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

WHEN AI SHOULD HAND OFF TO A PERSON

No cooling at all, water leaking, ice on the lines, or any burning smell.

WHAT AI MUST NEVER SAY ABOUT IT

That a tune-up will fix a system that isn't cooling, or a price for a new system.

Your services

SERVICE NAME

PRICE & WHAT CHANGES IT

HOW LONG IT TAKES

WHAT'S INCLUDED

THE WAY YOU'D SAY IT ON THE PHONE

WHEN AI SHOULD HAND OFF TO A PERSON

WHAT AI MUST NEVER SAY ABOUT IT

SERVICE NAME

PRICE & WHAT CHANGES IT

HOW LONG IT TAKES

WHAT'S INCLUDED

THE WAY YOU'D SAY IT ON THE PHONE

WHEN AI SHOULD HAND OFF TO A PERSON

WHAT AI MUST NEVER SAY ABOUT IT

More services, in short

SERVICE	PRICE OR RANGE	WHAT CHANGES THE PRICE	HAND OFF WHEN
Example: Furnace tune-up	$129 per system	Second system $99	No heat in freezing weather
Example: Diagnostic visit	$89, waived if repair approved	After hours: $189 instead	Gas smell: leave and call 911

MINIMUM CHARGES, TRIP FEES, DEPOSITS

$89 diagnostic, waived if the repair is approved the same day. 50% deposit on new systems.

WHAT YOU DON'T DO

No commercial rooftop units, no window AC units, no plumbing beyond the condensate line.

YOUR MINIMUMS, TRIP FEES, DEPOSITS

WHAT YOU DON'T DO

SECTION 3 · POLICIES

The rules customers ask about

Write the rule, then the exception. AI tools get policies wrong when the exception is missing.

BOOKING

Book by phone, text or online. Same-day for repairs when we have a slot; tune-ups usually within 3 days. We need the address, system type if known, and a phone number.

CANCELLATIONS AND NO-SHOWS

Free to cancel or move up to 2 hours before. A missed visit with no notice is $49, waived the first time.

PAYMENT

Card, check or bank transfer, due when the work is done. Financing on new systems through our lender.

GUARANTEES AND WARRANTIES

Repairs: 1 year parts and labor. New systems: 10-year parts (registered), 2-year labor. Tune-ups: if it breaks within 30 days for something we checked, the visit is free.

Your policies

BOOKING: HOW FAR AHEAD, HOW TO BOOK, WHAT YOU NEED

CANCELLATIONS AND NO-SHOWS

PAYMENT: METHODS, WHEN DUE, DEPOSITS

GUARANTEES, WARRANTIES AND RETURNS

BEFORE YOU START

Safety, access, preparation.

SECTION 4 · TOP QUESTIONS

The 20 questions customers ask most

Write the answer you'd give and anything the AI must never say. Start with these, then add the ones from your inbox, reviews and call notes.

QUESTION	YOUR ANSWER	NEVER SAY
Example: Do you work on Sundays?	Emergency calls only, with the $189 after-hours fee, waived if the repair goes ahead.	That the fee is waived before the repair is approved.
Example: What's your financing rate?	Rates come from our lender and depend on credit; your comfort advisor explains the options at the estimate.	A rate, or that financing is approved.
Example: Do you service Lennox units?	Yes, all major brands, including Lennox, Carrier, Trane and Goodman.	That a repair is covered by the Lennox warranty.
How much does it cost?		
How soon can you come?		
Do you work in my area?		
Are you licensed and insured? (if it applies)		
How long does it take?		
What do I need to do before you arrive?		
What payment methods do you take?		
What if I'm not happy?		

QUESTION	YOUR ANSWER	NEVER SAY

SECTION 5 · HOW THINGS GET DONE

Your processes, as numbered steps

Pick the processes a new hire asks about most. Write each the way you'd explain it standing next to them. Five is a good start.

PROCESS NAME

Booking an emergency call after hours

WHO DOES IT, AND HOW OFTEN

On-call technician; a few times a week in summer and winter.

STEPS, IN ORDER

1. Take the address, the problem and a callback number. 2. Tell the caller the $189 after-hours fee, waived if they approve the repair. 3. Text the on-call tech the details. 4. Tech calls back within 30 minutes. 5. Log the call in the job app before morning.

COMMON MISTAKES

Forgetting to mention the fee up front. Not checking for a gas smell first (that's a 911 call).

PROCESS 1: NAME

WHO DOES IT, AND HOW OFTEN

STEPS, IN ORDER (ONE PER LINE)

COMMON MISTAKES, AND HOW TO AVOID THEM

PROCESS 2: NAME

WHO DOES IT, AND HOW OFTEN

STEPS, IN ORDER (ONE PER LINE)

COMMON MISTAKES, AND HOW TO AVOID THEM

PROCESS 3: NAME

WHO DOES IT, AND HOW OFTEN

STEPS, IN ORDER (ONE PER LINE)

COMMON MISTAKES, AND HOW TO AVOID THEM

SECTION 6 · HOW YOU TALK, AND WHEN A PERSON TAKES OVER

Your voice, and your limits

WORDS YOU USE WITH CUSTOMERS

"Comfort plan", not "maintenance contract". "Your system", not "the unit". We say "Happy to help".

PROMISES THE AI MUST NEVER MAKE

Exact arrival times, prices for new systems before an estimate, financing approval, or anything about gas safety beyond "leave and call 911".

QUESTIONS THE AI SHOULD NEVER ANSWER

Gas smells, carbon monoxide alarms, electrical burning smells, billing disputes, warranty claims.

WHAT COUNTS AS URGENT, AND WHO TO CONTACT

No heat below 40°F outside, no cooling above 90°F, water leaking, any alarm. Text the on-call tech at the on-call number in the job app.

WORDS YOU USE, AND WORDS TO AVOID

PROMISES THE AI MUST NEVER MAKE

QUESTIONS THE AI SHOULD NEVER ANSWER

WHAT COUNTS AS URGENT, AND WHO TO CONTACT

SECTION 7 · KEEPING IT CURRENT

One owner checks it every month

WHO OWNS THE BUSINESS BRAIN

Maria, office manager.

WHEN IT'S CHECKED

First Monday of each month, 15 minutes.

WHO OWNS THE BUSINESS BRAIN

WHEN IT'S CHECKED

LAST UPDATED (DATE)

Before you load it

- [ ] Every service your team quotes is in section 2, with what changes the price.
- [ ] Section 4 has at least 20 questions, including the awkward ones.
- [ ] Every "hand off to a person" rule names who, and how to reach them.
- [ ] Nothing in the file is a customer's name, a card number, a password or a health detail.
- [ ] Someone who doesn't work here could read it and answer a customer correctly.

Save it as one file. When every section is filled in, save the workbook as one Word or PDF file named "[Business name] Business Brain". That file is what you load into each tool (see the load guide).