SAMPLE REPORT — FICTIONAL BUSINESS

Where your hours are going.

AI Tools Assessment · Caprock Heating & Air — Lubbock, TX

26 hours a week of repeat work found · **$210K** in quotes nobody followed up on

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EXECUTIVE SUMMARY

THE SHORT VERSION

Your situation, my prescription, and what it's worth — before any of the evidence. Everything on this page is defended by a slide that follows.

WHERE YOU ARE

You're writing every install quote yourself, at the kitchen table, after eight — because you're the only person in the company who can price a job. Brenda runs dispatch off text messages and a legal pad, then re-types the same tickets into QuickBooks the next morning. You booked this assessment to ask about a chatbot for the website.

WHAT I'M PROPOSING

Not the chatbot — not first. Get the price book out of your head and onto paper, put the field work on a real platform so the double entry disappears, and give quote follow-up an owner. Then automate the parts that turn out to be rules rather than judgment.

WHAT YOU SHOULD EXPECT

21.5 hours a week back across the business, 11.5 of them yours. Quotes out inside 24 hours of the site visit instead of two to four nights. And 41 quotes worth $210K that currently age quietly get worked instead.

WHAT IT COSTS

About $330 a month in software against roughly $5,400 a month of recovered time. Implementation is quoted separately if you want my hands on it — or $0 and your own evenings. This blueprint works either way.

1 Where your time is going

Every number below came from your own answers on the call — frequency × duration × who does it.

Process	Who	Hrs / wk	Cost / wk	Where it breaks
Writing install & replacement quotes	Owner	**7.5**	$1,125	Only Danny can price; gets done after 8pm
Re-typing paper tickets into QuickBooks	Office mgr	**5.0**	$140	Double entry; numbers get mis-keyed
Dispatch by text message and callback	Office mgr	**6.0**	$170	No shared schedule; techs phone in for the next job
Answering the same ~10 customer questions	Office mgr + Owner	**4.0**	$250	No written answers; every call interrupts dispatch
Chasing unpaid invoices	Office mgr	**3.5**	$100	No reminders — runs on memory

26 hrs

of repeatable work per week — roughly **$7,700 a month** in loaded cost. About 11.5 of those hours are yours, Danny, and most of them happen after dinner.

2 Where money is leaking

Time-cost finds waste inside the shop. This slide is what it costs when a prospect has to wait on you.

2 days

average reply to a website lead — reconstructed from your inbox. The competitor who answers same-day usually gets the site visit.

$210K

sitting in 41 open quotes more than 30 days old. Nobody's job is to follow up, so nobody does.

~30%

of peak-season missed calls never get a callback. In July, that voicemail box is a lead graveyard.

1 in 5

maintenance agreements quietly lapse each year. Renewals are tracked in Brenda's memory, not a system.

3 What you can’t currently answer

Every “I don’t track that” from the call, written down. Gaps aren’t failures — they’re the roadmap.

- ? **What share of quotes turn into jobs** — You guessed “maybe half?” — the real number decides whether the problem is quote speed or lead volume.
- ? **How fast you respond to a new inquiry** — Untracked. You can’t improve a number you’ve never seen.
- ? **What a new customer costs you** — Ad spend exists, attribution doesn’t. “Mostly referrals, probably” is a guess, not a channel strategy.
- ? **Margin by job type** — Installs vs. service calls vs. maintenance — you’re pricing all three on feel.
- ? **Which customers are due for renewal or replacement** — 260 maintenance agreements and a 12–15 year equipment clock, none of it queryable.

Why this matters: tracking comes before automating. Three of these gaps close for free inside the tools recommended on slide 7.

4 Your quote workflow, traced

The single most expensive workflow in the business, followed end to end. The waits cost more than the work.

Call or web form comes in ▶ Brenda logs it on the legal pad ▶ Danny calls back to book a visit ▶ Site visit & measure-up ▶ Quote written at the kitchen table ▶ Quote emailed out

WAITS 1–2 DAYS

WAITS 2–4 NIGHTS

AFTER THE EMAIL: nothing. No reminder, no follow-up, no owner of the next step. This is where the $210K on slide 2 lives.

Looked up along the way: supplier price PDFs buried in email · Danny's head (labor rates & every exception) · old Word quotes · Google Calendar · QuickBooks

Actual judgment required: equipment sizing and selection — that stays human. Everything else in this chain is a rule nobody has written down yet.

YOUR QUOTE WORKFLOW — BEFORE AND AFTER

Same six steps. The difference is who waits, and whether anyone owns the next move.

BEFORE — TODAY

- **Call or web form comes in**
- ↓ Brenda logs it on the legal pad
- ↓ **WAITS 1–2 DAYS**
- ↓ Danny calls back to book a visit
- ↓ Site visit & measure-up
- ↓ **WAITS 2–4 NIGHTS**
- ↓ Quote written at the kitchen table, after 8pm
- ↓ Quote emailed out
- ↓ **THEN NOTHING.**

No reminder, no follow-up, no owner. 41 quotes · $210K.

TODAY **3–6 DAYS TO QUOTE · NO FOLLOW-UP**

AFTER — WITH THE STACK

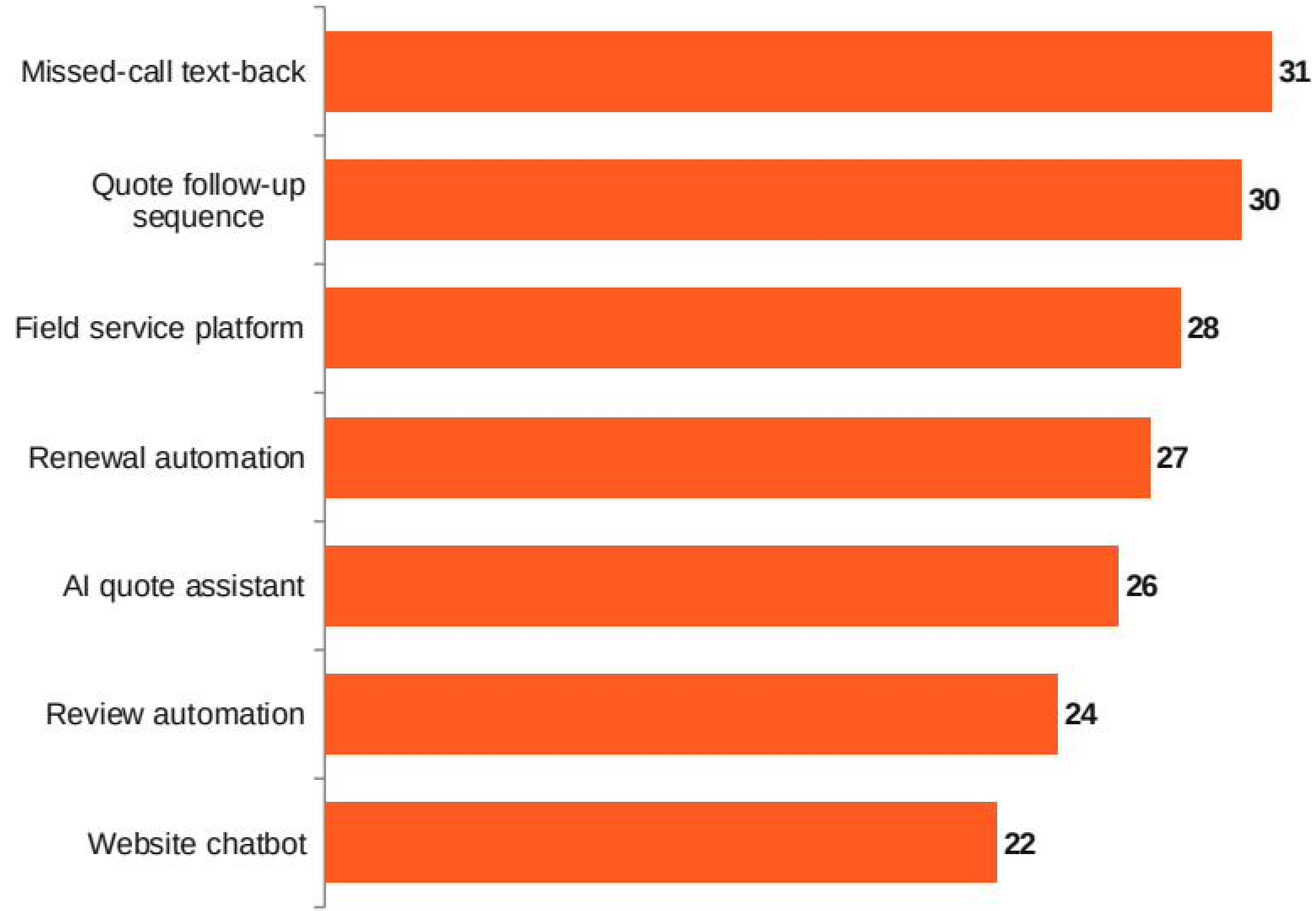
- **Call or web form comes in**
- ↓ Text-back fires in seconds — response time logged — AUTO
- ↓ Lead lands in Housecall Pro; visit booked on shared calendar
- ↓ Site visit; measurements captured on the tech’s phone — HUMAN
- ↓ Claude drafts the quote from the price book + notes — AUTO
- ↓ Danny reviews, prices exceptions, sends — 15 min — HUMAN
- ↓ Follow-up runs day 2, 7 and 14 until answered — AUTO
- ↓ Job closed → invoice, reminder, review request — AUTO
- ↓ **THEN THE CLOCK STARTS.**

Renewal reminder at 11 months. Replacement flag at year 12.

AFTER **UNDER 24 HRS · FOLLOW-UP AUTOMATIC**

5 Every opportunity, scored

Seven factors, 1–5 each: revenue impact, time sensitivity, volume, data readiness, effort, risk, provability. Max 35.



About that chatbot.
It's the thing you asked about — and it's real, just seventh. It scores low on data readiness: it has nothing accurate to say until the price book and FAQ answers exist.

Why text-back wins first.
Fires every day, needs zero data cleanup, installs in an afternoon, and the result is provable against a baseline. The best first move is rarely the most ambitious one.

6 Fix these before automating anything

Automation makes a good process faster — and makes a bad one fail at scale. Four cleanups come first.

1 Write the price book

Labor rates, markups, and every exception currently live in Danny's head. This is the blocker for the quote assistant, the chatbot, and any vacation Danny ever wants to take.

2 One customer record

Customer history is split across QuickBooks, paper tickets, and Brenda's spreadsheet. Consolidate into one system before anything is built on top of it.

3 Give quote follow-up an owner

The most expensive unowned step in the business. Assign it to a person this week; automate it in Phase 2.

4 Kill the double entry

Paper ticket → QuickBooks re-typing disappears entirely once techs close out jobs on their phones. Don't automate the re-typing — delete it.

7 The recommended stack

Off-the-shelf wherever it wins. Nothing custom gets built until Phase 3 — and only if the numbers say so.

Tool	What it takes over	Est. / month
Housecall Pro (or Jobber)	Scheduling, dispatch, digital job tickets, invoicing, payment reminders — kills the legal pad and the double entry	~$190
Missed-call text-back	Instant "got your call, what do you need?" text on every missed ring; logs response time (closes gap #2)	~$45
Claude	Drafts quotes from the price book + site-visit notes for Danny's review; drafts follow-ups and FAQ replies	~$20
Review requests (built-in or NiceJob)	Automatic review ask after every closed job — the referral engine, systematized	~$75
QuickBooks	Stays. It syncs with the field-service platform instead of being hand-fed.	current

~$330/month all-in against roughly $5,400/month of recovered time (slide 10). Prices are current published estimates — verify at signup.

THE SYSTEM — WHAT CONNECTS TO WHAT

Everything above the line is software you buy. Everything below it is what you write down — and it's the part that makes the rest work.

INBOUND

Phone call

Website form

Missed call

Missed-call text-back — instant reply on every unanswered ring, and the response-time clock starts here

AUTO

ALL PRO — THE SYSTEM OF RECORD

Scheduling & dispatch · digital job tickets on the tech's phone

One customer record · full job and equipment history

Invoicing, payment reminders, maintenance renewal dates

Claude

Drafts quotes, follow-ups and FAQ replies

syncs

QuickBooks

Books only. Nothing gets hand-typed into it again.

Quote drafted → Danny sends

HUMAN GATE — nothing goes out unreviewed

Follow-up & payment reminders

Day 2, 7, 14 · invoices chase themselves

Reviews & renewals

Ask after every close · renew at 11 months

THE KNOWLEDGE LAYER — WHAT EVERY BOX ABOVE NEEDS TO KNOW

The price book	Top-10 answers	Service & terms	Agreement terms
Labor rates, markups, every exception	The questions that eat 4 hrs a week	Service area, financing, warranty rules	260 agreements and the renewal schedule
OWNER: DANNY · QUARTERLY	OWNER: BRENDA · QUARTERLY	OWNER: DANNY · ANNUAL	OWNER: BRENDA · MONTHLY

THE TWO RULES: software drafts, a human sends · customer data stays inside Housecall Pro and never gets pasted into an outside tool

8 The knowledge foundation

What every system above needs to know, where it will live, and the rules that keep it safe and current.

WHAT GETS WRITTEN DOWN

- The price book — labor rates, markups, exceptions (owner: Danny; reviewed quarterly)
- Top-10 customer questions with approved answers (owner: Brenda)
- Service area, financing terms, and warranty rules — currently three different answers depending on who picks up
- Maintenance agreement terms and renewal schedule

THE RULES

- See vs. change: software drafts quotes, texts, and replies — a human sends every one. Nothing goes out unreviewed.
- Customer data stays inside the field-service platform — never pasted into outside tools.
- Every document gets one named owner and a review date. Unowned knowledge rots.
- If the price book and the software disagree, the price book wins — and gets fixed the same day.

9 Quick wins — the first four days

No new software required for three of the four. Do these before anything else in this report.

DAY 1 Turn on missed-call text-back

One afternoon of setup. Every missed ring gets an instant text instead of a voicemail nobody checks.

DAY 2 Work the 41 stale quotes

Brenda sends a two-line check-in to every open quote over 30 days. Script included in the appendix. Even a 10% revival is real money.

DAY 3 Write the top-10 answer sheet

One page of approved answers to the questions that eat 4 hrs/week. Tape it to the desk; it becomes the chatbot's brain later.

DAY 4 Start the response-time log

A shared note: inquiry time in, reply time out. Two weeks of this closes the biggest gap on slide 3 and sets the baseline every fix is measured against.

Guarantee check: the quick wins alone reclaim ~6 hrs/week — past the 5-hour bar before a single tool is bought.

10 What each fix is worth

Hours reclaimed × loaded rate, minus tool cost. Revenue upside from the stale quotes is not counted — it's gravy.

Fix	Hrs / wk back	Whose hours	Net $ / month
Quote drafting assistant (after price book exists)	4.5	Owner	**$2,900**
Field service platform (dispatch + double entry + reminders)	11.0	Office mgr	**$1,150**
Answer sheet + missed-call text-back	3.0	Both	**$780**
Automated invoice & renewal reminders	3.0	Office mgr	**$540**

$5,370 / mo

net of ~$330/month in tools — 21.5 hours a week back across the business. **The owner hours alone pay for this assessment roughly every three days.**

BEYOND THE ROI TABLE

THREE NUMBERS THE LAST SLIDE DOESN'T SHOW

Hours and dollars are only part of it. These three are what the recovered time actually buys — and what you're carrying until you spend it.

THE RISK YOU'RE CARRYING

2 WEEKS

is how long the quote pipeline survives if you're out — sick, hurt, or on a first vacation in four years. Pricing exists in one head. There is no second copy, and no one else can write the quote.

PAYBACK PERIOD

3 DAYS

At $5,370 a month recovered, this assessment pays for itself in about three days and the ~$330/month software stack pays for itself in two. Everything after that is the business keeping it.

CAPACITY UNLOCKED

5 VISITS

11.5 owner hours a week is roughly five more site visits — or the first four-day week since you started the company. Which one you spend it on is the actual decision here.

> Revenue from the 41 stale quotes is still not counted anywhere in this deck.
> It stays gravy — the numbers above hold without it.

11 The order of operations

Sequence matters: clean the process, build the knowledge, then automate — and measure everything against the Day-4 baseline.

WEEK 1

Quick wins

Text-back on, stale quotes worked, answer sheet written, response-time log running.

WEEKS 2–4

Foundation

Price book written. Field service platform stood up; techs on phones; double entry dies.

WEEKS 5–7

First managed workflow

Quote assistant + automated follow-up sequence, run against acceptance tests.

ONGOING

Measure & maintain

Monthly scorecard vs. baseline; price book reviewed quarterly. This is the managed part.

Acceptance tests (defined now, not later): 90% of inquiries answered within 15 minutes · every quote out within 24 hrs of the site visit · zero paper re-entry by day 45 · renewal lapse under 5%.

The one assumption to verify first: that slow quotes — not lead volume — are what's costing you jobs. Two weeks of the response-time log plus ten calls to the stale-quote list settles it before anything big gets built. If it's wrong, the priority order changes.

This blueprint is yours either way.

Everything in it can be done without me. Three questions before you go:

1. Do you want my help implementing it?
2. Which one will you tackle first?
3. How urgent is it?

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