
Where AI gives you time *back.*

PREPARED FOR

Residential HVAC & plumbing · Northeast metro · 11 employees

ASSESSMENT

AI tools, 30–45 min call

PAGES

10 sections, single scroll

In your own words.

| *I'm under a house and my phone is in the truck. By the time I call back, they've booked somebody else.*

| *Every quote comes out of my head at nine at night. My wife knows the sound of the laptop opening.*

| *We ran six hundred jobs last year and I couldn't name one customer who's due for a tune-up.*

The pain, and the *outcome*.

THE PAIN

The business runs on your memory, and your memory clocks out at midnight.

Three of your biggest leaks are really the same leak: work that only exists inside your head. Calls you cannot take, quotes only you can write, and a customer list nobody follows up on. At your size, low single-digit millions in revenue with eleven people and roughly a four-to-one field-to-office ratio, there is no one to hand this to. It is not a skill problem. It is a capacity problem, and it gets worse in your busy season, which is exactly when it costs the most.

THE OUTCOME

The routine work answers, quotes, and follows up without you.

Every missed call gets a text and a booking link inside a minute. Quotes leave the same day from the truck instead of the kitchen table. Past customers hear from you on a schedule you set once and never touch again. You stay on the tools, and the office work stops waiting for you to be free.

6

HOURS RECLAIMED / WEEK

4

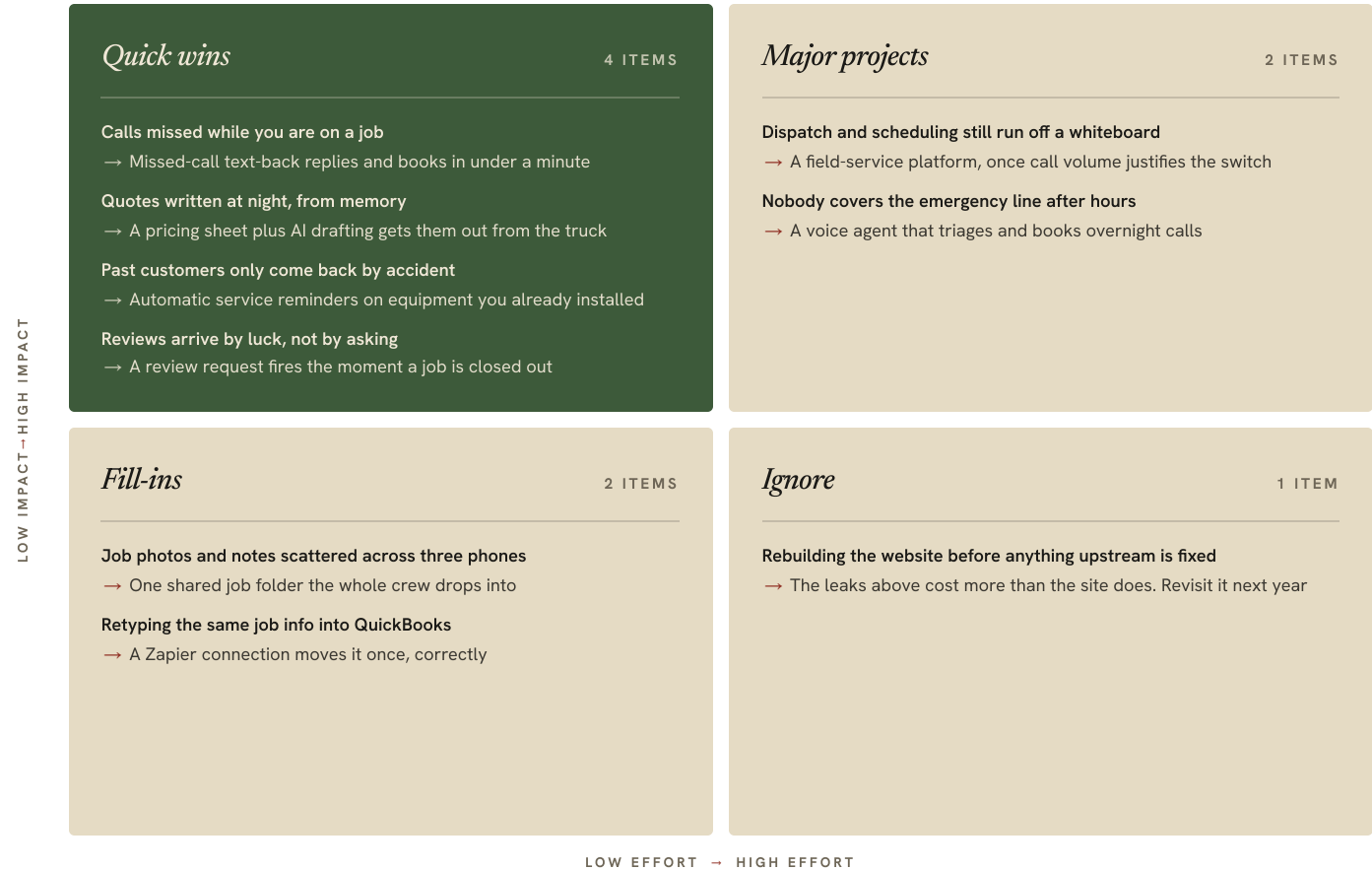
QUICK WINS

Capacity

PRIMARY FOCUS

Impact × effort.

QUICK WINS High impact, low effort — do these first	MAJOR PROJECTS High impact, high effort — plan carefully	FILL-INS Low impact, low effort — batch when convenient	IGNORE THESE Low impact, high effort — skip for now
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4 *recommendations*, ranked.

01

CALLS MISSED WHILE YOU ARE ON A JOB

Missed-call *text-back*

Tools like OpenPhone or Podium answer every call you could not pick up with a text and your booking link. You keep your number and your carrier. A call you physically could not take still turns into a scheduled job.

COMPLEXITY

plug-and-play

SETUP TIME

1 hour

COST / MONTH

\$30-60

TIME SAVED /
WK

2 hrs

02

QUOTES WRITTEN AT NIGHT, FROM MEMORY

AI *quote drafting*

Your standard jobs and price ranges go into one sheet. Claude or ChatGPT turns three lines of notes into a clean, sendable quote in about two minutes, in your wording, not a template's. You review it from the truck and send it before you pull out of the driveway.

COMPLEXITY

some-setup

SETUP TIME

2-3 hours

COST / MONTH

\$0-20

TIME SAVED /
WK

2.5 hrs

03

PAST CUSTOMERS ONLY COME BACK BY ACCIDENT

Automated *service reminders*

Every system you install has a service interval you already know. Housecall Pro or Jobber can fire that reminder on the date without you touching it. The cheapest job you will ever sell is to someone whose furnace you already know.

COMPLEXITY

some-setup

SETUP TIME

2 hours

COST / MONTH

\$40-80

TIME SAVED /
WK

1 hr

04

REVIEWS ARRIVE BY LUCK, NOT BY ASKING

Review *requests*

The request goes out the moment a job is marked complete, while your tech is still in the driveway and the customer is still happy. Your Google Business Profile fills in on its own, which is where your next customer is already looking.

COMPLEXITY

plug-and-play

SETUP TIME

30 min

COST / MONTH

\$0-25

TIME SAVED /
WK

0.5 hrs

A 4-day *plan*, in order.

THIS WEEK

Turn on missed-call text-back

One afternoon of setup. Every call you cannot pick up gets an instant text with your booking link, so the job stops going to the next number on the list. It is the only item on this plan that can pay for itself before the week is out.

DAY

01

Turn on missed-call text-back and point it at your booking link

Missed-call text-back

DAY

02

Write your pricing sheet, then draft two real quotes with it

AI quote drafting

DAY

03

Switch on the review request that fires when a job closes

Review requests

DAY

04

Load your install list and schedule the first service reminders

Automated service reminders

What comes *next*, when these are in.

These are real and worth doing. They are just not first, because each one needs the first win banked before it earns your time. Nothing here is urgent today.

i

Move dispatch and scheduling off the whiteboard and into a field-service platform

EFFORT

medium

START

when the whiteboard costs you a double-booking

PATH

Done with you

ii

Put job photos, notes, and signatures in one shared place the whole crew actually uses

EFFORT

low

START

anytime after the four-day plan is running

PATH

Done with you

iii

Add a voice agent that triages and books the after-hours emergency line

EFFORT

high

START

once text-back is proven and you trust the booking flow

PATH

Done for you

This is your roadmap, not a to-do list. Pick one when the four-day plan is running.

The *numbers*, plain.

HOURS / WEEK

6

returned to you

YOUR HOUR IS WORTH

\$85

your number, from our call

MONTHLY TIME VALUE

\$2,058

every month, after tool cost

Hours: missed calls 2 + quotes 2.5 + reminders 1 + reviews 0.5 = 6 hrs/wk
Value: 6 hrs x 4.33 wks x \$85 = \$2,208/mo
Tools: minus \$150/mo
Time value: \$2,058/mo
Against: Done with you at \$1,000/mo. Time value still runs \$1,058/mo ahead of it.

Next steps, *if easier with help.*

Done with you

You build it, I coach you through it. Two working sessions a month, you keep the keyboard and I unblock the decisions. What we set up together:

- A personal AI operating system: context files and a workspace built around how you actually work.
- Custom skills and prompts for the repetitive tasks you hit every week.
- Your first process automations, shipped live so you can adjust and extend them yourself.

\$1,000–\$1,500/mo

Done for you

I build it for you, write the SOPs your team will follow, and hand it off. Best for the heavier builds you would rather not run yourself.

Common projects:

- Multi-step automations wired across the tools you already use.
- A knowledge system or custom GPT trained on your past calls, notes, and decisions.
- A speed-to-lead agent that answers and books before you reach your phone.

starting at \$5,000

Not a hard sell. Just what's possible once you have the foundation in place.

Start with the *phone*.

Work the four days in order. The phone goes first because it is the only one of the four that is losing you jobs right now, today, while you read this. The other three are recovering your time. That one is recovering revenue. Nothing on this list asks your crew to learn a new system, and nothing on it replaces a tool you already pay for.

— *Jorge* PRACTICE FOUNDER

Residential HVAC & plumbing · Northeast metro · 11 employees • Illustrative sample

Illustrative sample. A composite of patterns common to owner-led service businesses, not a real client engagement. No client data appears here.

End of assessment