



SAMPLE AUDIT, INVENTED BUSINESS

AI AUDIT • TALLOW CREEK HEATING & PLUMBING

**7.3 HOURS
A WEEK**

Your numbers, added up. Yours to keep.

About \$31,097 a year back.

About \$19,267 net return in year one, \$22,834 a year after that.

Minutes a week back to you, after the reading and sending that stays yours, priced at your own number over 50 working weeks. Rows marked estimated are my read of what you described; the rest are your own count. The right side is your investment to get them back, also estimated.

\$31,097

A YEAR BACK

MINUTES BACK A WEEK • DOLLARS A YEAR

 Sales process	86 min • \$6,092
 Team & delegation	58 min • \$4,108
 Email & inbox	45 min • \$3,188
Customer service	41 min • \$2,904
 Financial software	40 min • \$2,833
Documents	40 min • \$2,833
 Content & marketing	39 min • \$2,763
 Scheduling	35 min • \$2,479
 Data entry	27 min • \$1,913
 CRM	14 min • \$992
Meetings	14 min • \$992

\$11,830

YEAR ONE INVESTMENT

The Setup, two hours with me (includes month one of Accelerate)	\$1,397
Your 2 hours in that session, at \$85/hr	\$170
Getting the 16 builds working, about 11.7 hours of yours at \$85/hr (estimated)	\$992
Testing and fixing as you go, 10% of the hours back (estimated)	\$3,110
Accelerate for the other 11 months of year one	\$6,017
Tools you might add (Typeless), the first one on each row, 12 months at today's prices, if you take them (estimated)	\$144

\$19,267

NET RETURN ON INVESTMENT

Net return on investment, year one **\$19,267**

Every year after: \$31,097 back, less 5% for upkeep, the tools and 12 months of Accelerate **\$22,834**

PAYS BACK THE SETUP, YOUR 2 SESSION HOURS AND YOUR 11.7 BUILD HOURS IN MONTH 2, AFTER THE TOOLS, THE TESTING AND THE PLAN



II YOUR STACK, AND THE MAP

 Google Sheets

 QuickBooks

 Housecall Pro

 Gmail

 Google Business Profile

 Facebook

 ChatGPT

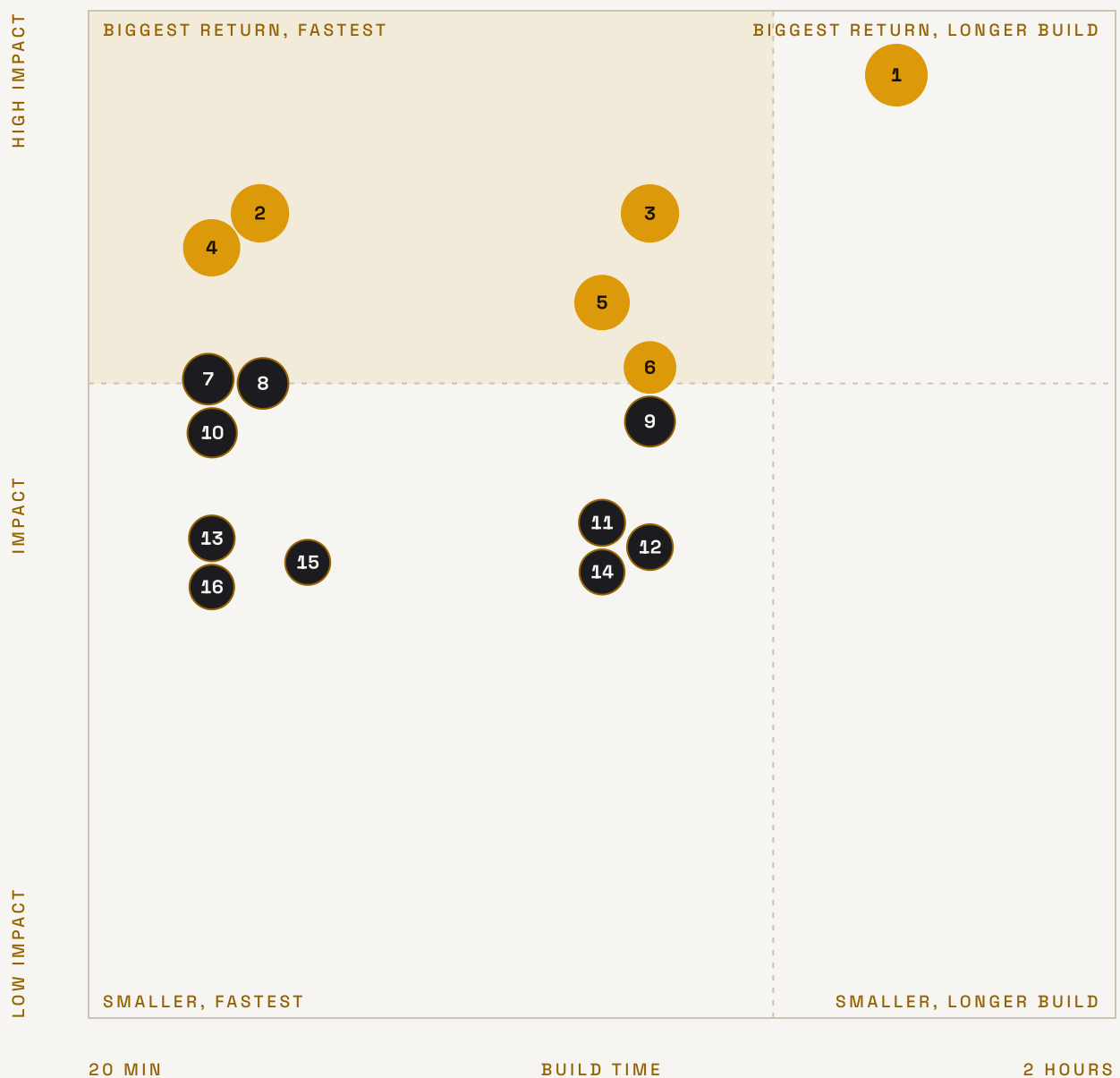
 Google Workspace

 iPhone

 Google Calendar

Where each one sits.

Gold is what to do first. Left to right is build time, not difficulty. Numbers match the list that follows.



All 16, nothing left out.

Each one runs from day one, some on your word, some on their own. Row returns are before the Setup, your own hours in that session and the monthly plan, which page 2 counts once.

#	WHAT YOU DO NOW	WHAT IT BECOMES	SAVES A YEAR	RETURN, YEAR ONE
DO FIRST • START HERE				
1	Sales process 25 min, 120 to 160 times a year · estimated Writing furnace and AC replacement quotes after the in-home visit, typed out in Housecall Pro with good, better and best options	Talk through what you saw at the house and it drafts the good, better and best quote, priced from your own price book.	\$3,825 to \$5,100 70 → 7 min a week	\$3,702 about 2 h to build (est.)
WORTH ADDING 🐼 Typeless \$12 a month, billed yearly (\$144 a year)				
2	Email & inbox 10 min, 1 time a day Sorting the office inbox of supply-house invoices, warranty emails and customer questions	Every morning it files the supplier and warranty mail and puts the customer questions on top with a reply drafted.	\$3,188 50 → 5 min a week	\$2,840 about 20 min to build (est.)
3	Team & delegation 10 min, 1 time a day Building the next day's dispatch board each afternoon, matching open jobs to techs by area and skill	Each afternoon it drafts the next day's board from the open jobs and each tech's area, and flags any job it could not place.	\$3,188 50 → 5 min a week	\$2,784 about 1 h to build (est.)
4	Customer service 3 min, 10 to 20 times a week · estimated Returning after-hours voicemails first thing in the morning, most of them routine requests to book	It turns after-hours voicemails into a morning list and drafts a text back to each routine booking request; you call only the odd one.	\$1,913 to \$3,825 45 → 4 min a week	\$2,585 about 20 min to build (est.)
5	Scheduling 3 min, 10 to 16 times a week · estimated Typing the details of phone bookings into Housecall Pro while the caller is still on the line	Record the booking call on the iPhone and it fills in the Housecall Pro job, so the office only confirms the arrival window.	\$1,913 to \$3,046 39 → 4 min a week	\$2,146 about 1 h to build (est.)

III EVERYTHING WE FOUND, CONTINUED

#	WHAT YOU DO NOW	WHAT IT BECOMES	SAVES A YEAR	RETURN, YEAR ONE
6	 Data entry 3 min, 8 to 12 times a week · estimated Keying parts receipts from the supply house into QuickBooks against the right job	Snap the receipt and it enters the parts in QuickBooks against the right job.	\$1,558 to \$2,267 30 → 3 min a week	\$1,636 about 1 h to build (est.)
THEN, IN ORDER OF WHAT THEY GIVE BACK				
7	 Financial software 5 min, 4 to 8 times a week · estimated Chasing past-due invoices from property managers and commercial accounts by phone and email	Every Friday it sends a polite reminder on each past-due invoice and tells you which accounts need a call.	\$1,275 to \$2,550 30 → 3 min a week	\$1,693 about 20 min to build (est.)
8	 Content & marketing 15 min, 1 to 3 times a week · estimated Posting job photos to the shop's Facebook page, caption written from scratch each time	Send it the week's job photos and it writes each Facebook post, caption and all, in the shop's own voice.	\$992 to \$2,904 30 → 3 min a week	\$1,693 about 20 min to build (est.)
9	Documents 10 min, 120 to 160 times a year · estimated Registering equipment warranties with the manufacturer after each install, serial numbers copied off the unit	Send it a photo of the data plate and it fills in the manufacturer's warranty form and files the confirmation with the job.	\$1,558 to \$2,054 28 → 3 min a week	\$1,509 about 1 h to build (est.)
10	 Sales process 4 min, 5 to 8 times a week · estimated Following up on replacement quotes that have not been signed, one call or text at a time	Every Monday it lists the unsigned quotes and drafts a follow-up text for each one in your words.	\$1,275 to \$2,054 26 → 3 min a week	\$1,438 about 20 min to build (est.)
11	Documents 15 min, 3 to 6 times a month · estimated Preparing permit applications for the city and the townships, scope typed in by hand	Tell it the job and the town and it fills in that building department's permit form from the signed quote.	\$708 to \$1,346 16 → 1 min a week	\$871 about 1 h to build (est.)

III EVERYTHING WE FOUND, CONTINUED

#	WHAT YOU DO NOW	WHAT IT BECOMES	SAVES A YEAR	RETURN, YEAR ONE
12	 CRM 3 min, 200 to 300 times a year · estimated Calling maintenance-plan members to book the fall tune-up, working down a spreadsheet	Each August it texts every plan member a link to pick a tune-up slot and lists who has not booked.	\$779 to \$1,133 15 → 1 min a week	\$808 about 1 h to build (est.)
13	Meetings 15 min, 1 time a week Summing up the Monday team meeting so every tech knows what changed	Record the Monday meeting and it sends the techs a short list of what changed and who owns what.	\$992 15 → 1 min a week	\$864 about 20 min to build (est.)
WORTH ADDING  Otter free to 300 minutes a month, then \$17 a month				
14	 Financial software 60 min, 1 time a month Matching Housecall Pro payments to QuickBooks at month end	Once a month it matches every Housecall Pro payment to QuickBooks and lists only the ones that do not line up.	\$921 14 → 1 min a week	\$744 about 1 h to build (est.)
15	 Team & delegation 30 min, 2 times a month Collecting the techs' hours for payroll by text and a shared spreadsheet	The techs clock in on their phones and it has the hours totaled for payroll every other Friday.	\$921 14 → 1 min a week	\$800 about 20 min to build (est.)
WORTH ADDING  Homebase free up to 10 staff, then \$30 a month				
16	 Content & marketing 3 min, 3 to 6 times a week · estimated Answering Google reviews, the good ones and the bad ones	It drafts a reply to each new Google review in your voice and holds the bad ones for you to read first.	\$567 to \$1,133 14 → 2 min a week	\$737 about 20 min to build (est.)

Not on your plate today.

Things you said you want that nobody is doing by hand today, so they carry no dollar number. The by-hand figures are my estimate of what each would cost you to run yourself.

ON YOUR LIST	WHAT IT BECOMES	BUILD	BY HAND
A troubleshooting guide for newer techs, built from the questions they call the office with	Tell it the answer once and it goes in the guide, so the next tech finds it there.	about 1 h, once	about 30 min each 2 to 4 a month, ongoing
A monthly one - page report on margin by job type	Once a month it pulls the jobs from Housecall Pro and shows which work makes money.	about 1 h, once	about 2 h each 1 a month, ongoing

One two-hour session turns it on.

Getting started is \$997: two hours with me on your machine and your accounts, plus your first month of Cruise. You leave with the first wins running, or the Setup is free.

Cruise

\$147 a month

The full system, the community, the weekly call. You run it.

Start at \$997: the Setup plus month one

FITS WHAT YOU
DESCRIBED

Accelerate

\$547 a month

Cruise, plus an hour of my time every month.

Start at \$1,397: the Setup plus month one

Overdrive

\$1,197 a month

Accelerate, with three hours a month. I sit inside the business.

Start at \$2,047: the Setup plus month one

BOOK THE SETUP

Not ready for a plan? A one-off working session runs \$497.

This audit is yours either way. Take it to someone else or do it yourself. The numbers still hold.