



— THE PLAYBOOK

The 8 automations every small service business should *steal*.

The recurring time-sinks nearly every home-services shop shares — and the eight small automations that flatten them. Fix the first three and you get roughly ten hours a week back.

Nearly every home-services business — plumbing, HVAC, electrical, cleaning, contracting — bleeds hours the same way. Same repeated emails. Same reminders. Same forgotten review request. Below are the eight small automations that flatten those hours, in the order that pays back fastest. **Steal any of them.**

01 Automated quote & estimate replies

The owner retypes the same "here's what it'll cost" email all day. When a request comes in, a ready-to-go reply with your pricing is waiting — sent automatically for standard scopes, drafted for you to approve on anything unusual.

~4-5 HRS/WK 80-90% AUTOMATABLE

02 Appointment scheduling & reminders

Phone-tag to book, then no-shows that gut the day. Customers self-book, then get automatic text + email reminders 24 hours and 1 hour before — with a reschedule link so nobody's a "no-show" out of embarrassment.

~3-4.5 HRS/WK 80% AUTOMATABLE

03 Invoice creation & payment-reminder sequence

Writing invoices and chasing "hey, just following up." Invoices draft themselves when a job's marked done. A polite reminder runs at +3, +7, +14 days — and stops the second the payment shows up.

~2.5-3.5 HRS/WK 75% AUTOMATABLE



04 Review requests after paid jobs

You mean to ask, you never do. When a job is complete and paid, a text goes out the next day with your Google review link. Anyone unhappy is routed privately to you first — never auto-posted.

~1-1.5 HRS/WK 90% AUTOMATABLE

05 Lead intake → one place, no re-keying

Copying leads between your website, inbox, and spreadsheet. Every new lead lands in one list automatically, tagged with source and time — and pings you the second it arrives.

~2-4 HRS/WK 85% AUTOMATABLE

06 Missed-call text-back

A missed call is a lost job — the caller dials your competitor while you're on a roof. Miss a call and they instantly get a text: *"Sorry we missed you — we'll call right back, or reply here."* The lead waits for you in one thread.

CAPTURES LOST JOBS HIGH ROI

07 Weekly reporting snapshot

Monday spent hand-compiling numbers. Every Monday morning, a snapshot of last week — jobs done, revenue, outstanding invoices, week ahead — lands in your inbox. Compiled for you, not by you.

~2 HRS/WK 70% AUTOMATABLE

08 Supplier reorder / low-stock drafts

Surprise stock-outs and retyped reorder emails. When inventory hits a threshold, a pre-filled reorder email to your supplier is drafted, ready to send with one click.

~1-1.5 HRS/WK 60% AUTOMATABLE

The pattern behind the *list*.

These eight aren't clever. They're just the ones people keep meaning to build and never do — because when your day is running the business, the day never contains time to change the business.

The fix isn't more discipline. It's spending two weeks getting the boring stuff off your plate so the day contains the day.

[See how the 14-day AI Ops Audit works →](#)