

Your AI Workbook

Smith Heating & Cooling (sample)

4 people
interviewed

4 opportunities
found

10-17 hours
a week back, estimated

SUMMARY

The short version

Most of the office's week goes to the phone and to typing the same job in three times.

Smith Heating & Cooling runs on phone calls and notes passed between people. Dana spends most of her week returning voicemails and chasing quotes, and each job is typed in three times before it's invoiced. The quickest wins are on the phone, and the biggest fix is entering each job once.

We talked with Mike (Owner), Dana (Office manager), Luis (Dispatch), Rob (Lead technician).

10–17 hrs

a week of work that can be automated

2

quick wins you can start this month

4

opportunities in total

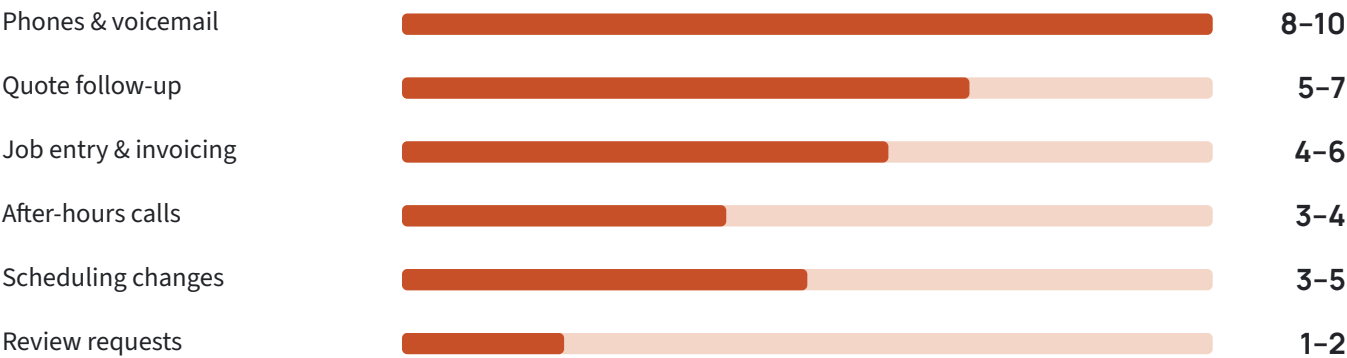
What stood out

- A new job is typed in by Dana, again by Luis for the schedule, and again by Dana in QuickBooks.
- About 1 in 4 calls go to voicemail during busy hours, and after-hours calls wait until morning.
- Open quotes sit about 9 days before anyone follows up.

WHERE THE TIME GOES

Where your team spends time

Repetitive work, in hours per week.



By person

PERSON	WHAT REPEATS MOST	HRS/WEEK
Dana, Office manager	Returning voicemails, chasing quotes, typing invoices	9-12
Luis, Dispatch	Re-entering jobs, calling about schedule changes	4-6
Mike, Owner	Calls on job sites, after-hours voicemail	3-5
Rob, Lead technician	Texting notes and photos to the office	1-2

ALL OPPORTUNITIES

Simplest to most involved

#	FIX	LEVEL	TIME BACK
1	Text back every missed call	QUICK WIN	4–7 hrs
2	Automatic follow-up on open quotes	QUICK WIN	3–5.5 hrs
3	Enter each job once	NEXT LEVEL	2–3.5 hrs
4	AI receptionist for after-hours calls	BIGGER PROJECT	2–3 hrs

Fixes can overlap, so the combined estimate (10–17 hours a week) is less than the sum.

START HERE

What we'd do first

If this were our business, this is the order we'd go in. Every item is explained step by step in Part 2.

Start here: quick wins

- | | | |
|---|------------------------------------|----------------|
| 1 | Text back every missed call | 4–7 hrs/week |
| 2 | Automatic follow-up on open quotes | 3–5.5 hrs/week |

Then consider

- | | | |
|---|---------------------|----------------|
| 3 | Enter each job once | 2–3.5 hrs/week |
|---|---------------------|----------------|

Later

- | | | |
|---|---------------------------------------|--------------|
| 4 | AI receptionist for after-hours calls | 2–3 hrs/week |
|---|---------------------------------------|--------------|

The first step together: about 7–12.5 hours a week back, for a one-time \$3,500 if we build it, paying for itself in about 3 months. Or do it yourself with the steps in Part 2.

WHAT TO DO FIRST

Your action plan

Week 1**Text back every missed call.**

The fastest win, and it catches jobs you're losing today.

Week 2**Automatic follow-up on open quotes.**

Reuses the same phone line and gets quotes answered days sooner.

Weeks 3-4**Enter each job once.**

The biggest time saver for the office, once the phones are calmer.

Weeks 5-6**AI receptionist for after hours.**

Builds on everything above and frees Mike's evenings.

When it's all running: an estimated 10–17 hours a week back across the team.

Part 2

Your implementation playbook

Every fix, step by step: two ways to do it, the tools to use, do-it-yourself instructions, and our one-time price if you'd rather we build it.

OPPORTUNITY 1 QUICK WIN

Text back every missed call

What happens today	About 1 in 4 calls go to voicemail when Dana is on another line. She returns them an hour or two later, and some callers have already booked someone else.
Workload	Phones and voicemail (8-10 hrs/week)
The fix	Every caller who reaches voicemail gets a text within a minute and can book, ask a question or ask for a call back.
Difficulty	Easy. Works with the phone number you already have.
Watch for	Customer-facing: messages are approved once up front, and anything unusual goes to Dana.
Once it's running	Missed calls turn into booked jobs instead of callbacks, and Dana starts the day with a short list instead of a full voicemail box.

OPTION A · STANDARD AUTOMATION

Automatic missed-call text

When a call goes unanswered, your phone system sends the same friendly text with a booking link. Replies land in a shared inbox for Dana.

Time back: about 2.5–4 hours a week · Tools: about \$30/mo · Setup: an afternoon

- **OpenPhone:** business line with missed-call auto-text (about \$15/user/mo)
- **Calendly:** the booking link (free plan)

Do it yourself

1. Sign up for OpenPhone and port or forward your main number (Settings > Phone numbers).
2. Open Settings > Auto-replies and turn on 'Missed call auto-reply'.
3. Paste a message, e.g. 'Sorry we missed you! Book here: [link] or reply with what you need.'
4. Create a free Calendly event called 'Service visit' and copy its link into the message.
5. Call your own number from a cell, let it ring out, and check the text arrives.
6. Show Dana the shared inbox where replies land.

Have JPR build it: \$750 · 2-3 days

JPR RECOMMENDS**OPTION B · THE AI WAY****AI text assistant for missed calls**

An AI texts the caller within a minute, finds out what they need, answers common questions from your price sheet and books the visit on Luis's schedule. Emergencies and anything it isn't sure about go straight to Mike's phone.

Time back: about 4–7 hours a week · Tools: about \$50/mo · Setup: 1-2 days

- **OpenPhone:** the business line (about \$15/user/mo)
- **OpenAI (ChatGPT API):** reads and writes the texts (about \$10-20/mo at your volume)
- **Zapier:** connects the line to the AI and your schedule (about \$20/mo)

Do it yourself

1. Set up OpenPhone as in Option A.
2. In Zapier, make a Zap: trigger 'OpenPhone > Missed call'.
3. Add 'ChatGPT > Conversation' with instructions: your services, prices, hours and when to hand off.
4. Add 'OpenPhone > Send message' to send the AI's reply.
5. Add a second Zap for replies so the AI can keep the conversation going and book with Google Calendar.
6. Test 10 made-up conversations, including an emergency, before turning it on.

Have JPR build it: \$1,500 · 1 week

Why we recommend it: Most callers want a time slot or a price, and the AI can handle both without waiting on Dana.

OPPORTUNITY 2 QUICK WIN

Automatic follow-up on open quotes

What happens today	Dana emails quotes from the office. Nobody follows up until she has time, about 9 days on average, and a couple of jobs a month go to whoever calls back first.
Workload	Quote follow-up (5-7 hrs/week)
The fix	Every open quote gets a follow-up on day 2 and day 5 that stops the moment the customer replies.
Difficulty	Easy. Works with the email and quoting you already use.
Watch for	Customer-facing: Dana approves the messages once, and price questions come to her.
Once it's running	Quotes get answered days sooner and Dana only talks to customers who are ready.

OPTION A · STANDARD AUTOMATION

Scheduled follow-up texts and emails

When a quote is sent, the same two messages go out on day 2 and day 5. Any reply stops them and alerts Dana.

Time back: about 2–4 hours a week · Tools: about \$20/mo · Setup: an afternoon

- **Zapier:** watches for sent quotes and schedules messages (about \$20/mo)
- **OpenPhone:** sends the texts (already in Opportunity 1)

Do it yourself

1. In Zapier, choose your quoting tool (or Gmail label 'Quotes') as the trigger.
2. Add 'Delay for 2 days', then a text and email with your day-2 message.
3. Add 'Filter: only continue if no reply', then a 3-day delay and the day-5 message.
4. Add a step that emails Dana when a customer replies.
5. Send a test quote to yourself and watch both messages arrive.

Have JPR build it: \$1,000 · 2-3 days

JPR RECOMMENDS**OPTION B · THE AI WAY****AI follow-up assistant**

An AI reads each quote and writes a personal follow-up that mentions the actual job. When the customer replies, it answers simple questions, books the job or hands it to Dana.

Time back: about 3–5.5 hours a week · Tools: about \$30/mo · Setup: a day

- **OpenAI (ChatGPT API)**: writes follow-ups and answers questions (about \$10/mo)
- **Zapier**: connects quotes, AI and messages (about \$20/mo)

Do it yourself

1. Start from the Option A Zap.
2. Before each message, add 'ChatGPT > Conversation' with the quote details and the instruction to write a short, friendly follow-up.
3. For replies, add a Zap that sends the customer's message to ChatGPT with your FAQ and booking rules.
4. Have every AI reply go to Dana for approval for the first two weeks.
5. Once the drafts look right, let routine replies send on their own.

Have JPR build it: \$2,000 · 1 week

Why we recommend it: Customers answer personal messages more often, and the AI can close simple jobs on its own.

OPPORTUNITY 3 **NEXT LEVEL**

Enter each job once

What happens today	Dana writes up the job when the customer calls. Luis re-types it into the schedule. After the job, Dana types it again into QuickBooks to invoice.
Workload	Job entry and invoicing (4-6 hrs/week)
The fix	One entry puts the job on Luis's schedule, and a draft invoice appears in QuickBooks when Rob marks it done.
Difficulty	Moderate. Your scheduling tool can connect to QuickBooks Online.
Watch for	Money: invoices stay drafts until Dana checks and sends them.
Once it's running	Each job is typed once, and billing mistakes from mismatched copies go away.

JPR RECOMMENDS

OPTION A · STANDARD AUTOMATION

Form-to-schedule-to-QuickBooks sync

A single intake form creates the job on the schedule. When the job is marked done, a connector creates the draft invoice in QuickBooks.

Time back: about 2–3.5 hours a week · Tools: about \$50/mo · Setup: 2-3 evenings

- **Jotform:** the one intake form (free plan)
- **Zapier:** moves the job between systems (about \$50/mo)
- **QuickBooks Online:** receives draft invoices (existing)

Do it yourself

1. Build a Jotform with customer, address, job type and notes.
2. In Zapier, trigger on a new form and create the event in your schedule.
3. Make a second Zap: when a job is marked done, create a draft invoice in QuickBooks.
4. Map the fields: customer, address, job type, parts and labor.
5. Run a week side by side with the old way before you stop it.

Have JPR build it: \$1,500 · 1-2 weeks

OPTION B · THE AI WAY**AI that reads tech notes and writes the invoice**

The same single entry, plus an AI that reads Rob's notes and photos after each job, lists parts and labor, and drafts the invoice lines for Dana to approve.

Time back: about 2.5–4.5 hours a week · Tools: about \$65/mo · Setup: 3-4 evenings

- **Zapier:** connects form, schedule and QuickBooks (about \$50/mo)
- **OpenAI (ChatGPT API):** turns tech notes into invoice lines (about \$15/mo)
- **QuickBooks Online:** receives draft invoices (existing)

Do it yourself

1. Set up the Option A form and sync.
2. Have techs send notes and photos through a simple form after each job.
3. Add 'ChatGPT > Extract data' with your parts list and labor rates to turn notes into line items.
4. Create the QuickBooks draft invoice with those lines.
5. Have Dana review every draft for two weeks and correct the parts list where needed.

Have JPR build it: \$3,500 · 2 weeks

Why we recommend it: Most of the time is in the retyping, which Option A removes; add the AI later if invoice lines still take long.

OPPORTUNITY 4

BIGGER PROJECT

AI receptionist for after-hours calls

What happens today	After 5pm, calls go to voicemail. Mike checks it at night and calls people back the next morning, and emergency calls sometimes wait until then.
Workload	After-hours calls and callbacks (3-4 hrs/week)
The fix	Every after-hours call is answered, booked or routed to the on-call tech.
Difficulty	Moderate. Works with your main line through call forwarding.
Watch for	Customer-facing and urgent: emergencies always ring through to a person.
Once it's running	No call goes unanswered, and Mike's evenings stay free unless it's a real emergency.

OPTION A · STANDARD AUTOMATION

After-hours answering menu

A phone menu answers after hours: press 1 for emergencies (rings the on-call tech), press 2 to leave details that arrive as a text and email.

Time back: about 0.5–1 hours a week · Tools: about \$15/mo · Setup: an afternoon

- **OpenPhone:** business hours, phone menu and voicemail transcription (about \$15/user/mo)

Do it yourself

1. In OpenPhone, open Settings > Business hours and set your hours.
2. Turn on the phone menu and record the greeting.
3. Point option 1 to the on-call tech's cell.
4. Turn on voicemail transcription so messages arrive as text.
5. Call after hours and test both options.

Have JPR build it: \$1,500 · 2-3 days

JPR RECOMMENDS**OPTION B · THE AI WAY****AI voice receptionist**

A natural-sounding AI answers, asks what's wrong, books regular service on the schedule and texts the customer a confirmation. It transfers real emergencies to the on-call tech.

Time back: about 2–3 hours a week · Tools: about \$50-75/mo · Setup: 2-3 days

- **Retell AI:** the AI voice agent (about \$0.10/min, roughly \$30-60/mo)
- **Google Calendar:** the schedule it books into (existing)
- **OpenPhone:** forwards after-hours calls (about \$15/user/mo)

Do it yourself

1. Create a Retell AI account and choose a voice.
2. Paste your instructions: services, hours, service area, prices you quote and what counts as an emergency.
3. Connect Google Calendar so it can book open slots.
4. Add a transfer rule: emergencies ring the on-call tech's cell.
5. In OpenPhone, forward after-hours calls to the Retell number.
6. Make 10 test calls, including an emergency, before going live.

Have JPR build it: \$3,500 · 1-2 weeks

Why we recommend it: Callers get booked on the spot instead of waiting for a callback, which is where the lost jobs are.

NEXT STEPS

Your plan. Your choice.

This workbook is yours to keep, whatever you decide.

Build it yourself

Every item has step-by-step instructions and the tools it needs.

Use your IT provider

Hand them this workbook.
Everything they need is in it.

Have JPR build it

Pick the items and options you want. Each has a set price, no hourly billing.

One price, and it's yours. Every build is a one-time price. We build it inside your own accounts, so you own it outright, with no monthly fee to us.

Each build includes 30 days of fixes after it goes live. Tool and AI usage costs are billed to your own accounts at the provider's price, with no markup.

Questions about your workbook? Reply to the email it came with, or write to justin@jpeace recruiting.com.