AI PLAYBOOK FOR TRADES · ELECTRICAL · PLUMBING · HVAC

4 practical AI steps that save time and win more jobs

You don't need to be a tech company to use AI. Start with one step, get it working, then add the next.

1 Quote Faster

Turn job notes, photos, or a quick voice memo into a clean, professional quote in minutes instead of hours. Keep a list of your common line items and prices so every quote stays consistent.

Example: "Panel upgrade, 200A, detached garage" becomes an itemized quote ready to send.

2 Follow Up Automatically

Open estimates get a friendly, timed follow-up by text or email, so jobs don't slip away while you're busy on site. Most lost jobs are simply never followed up.

Example: A reminder goes out 2 days after the quote, then again after a week.

3 Capture Missed Calls

When you can't pick up, customers instantly get a text back, so the lead stays with you instead of calling the next company on the list.

Example: "Sorry we missed you, what can we help with?" sent within seconds.

4 Customer Updates

Keep customers in the loop with automatic arrival windows, on-the-way texts, and job-complete messages. Fewer "where are you?" calls, better reviews.

Example: "Your technician is 20 minutes away."

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