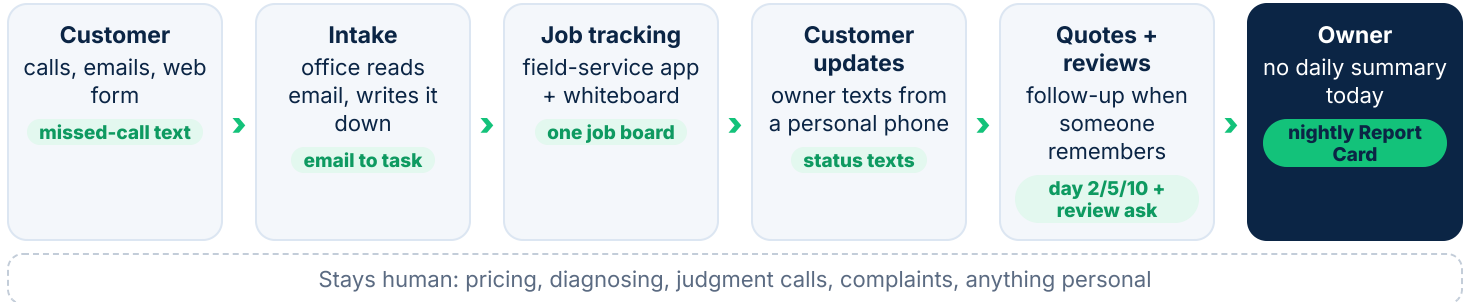


Sample Heating & Air Co. (demo) busywork map · Oct 15, 2026

HVAC service and installs · DMV Area · 6 people (owner, office manager, 3 techs, 1 installer) · from the owner's written answers

HOW WORK FLOWS TODAY, AND WHAT WE'D AUTOMATE



THE BUSYWORK, IN THE OWNER'S WORDS

TASK	HRS/WEEK*	TOOLS TODAY	WHAT WE'D AUTOMATE	STAYS HUMAN
Texting customers "when is the tech coming?"	5	Owner's cell	Status text from the job board at each step	Answering real questions
Chasing quotes that went quiet	3	Memory, sticky notes	Day 2, 5, 10 nudges in the owner's voice	Price changes
Typing up emailed and web requests	3	Shared inbox	Request becomes a job card, details pulled out	Booking odd jobs
Asking for reviews after jobs	1	Sometimes, by hand	Same review link to every customer; low score flags a call	Replies and callbacks
Figuring out what's open at end of day	2	Whiteboard + app	Nightly Report Card on the owner's phone	Decisions
Total	14		Tasks we'd automate: 5	

*Hours are the owner's estimates, not our measurement. We measure real numbers after the build.

Build these first

1. **Status texts** from the field-service app you already pay for (it already has a registered business number).
2. **Quote follow-up** on day 2, 5 and 10, held for your OK until you trust it.
3. **Nightly Report Card**: jobs, open quotes, follow-ups, reviews and reply time.

Built on your own accounts. You add us as a user or manager and can remove us anytime. No passwords.

AI search check (sample)

2/10

Sample result: the company was named in 2 of 10 "best HVAC near me" style questions across free AI assistants.

Fictional example. A real check lists each question, each assistant and the date it was run.

Want a quote for these three? Reply **QUOTE** and it comes back in writing.

DTRTLab