



R U B Y

# AI Operations Audit

Prepared for Mike — Reynolds Heating and Air

Assessment Date: 2026-07-05

# Executive Summary

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## THE PAIN

Mike spends ~4 hrs/week retyping paper job tickets into QuickBooks at night, pushing invoices out 3–5 days late, while Karen loses 6–8 hrs/week to call juggling and missed callbacks plus roughly 2 hrs/day double-entering jobs into Google Calendar and Excel — and emailed quotes get no follow-up at all.

## THE OUTCOME

Targeted tool additions and better automation can return **8+ hours per week** by eliminating manual steps and protecting focus time.

8

HOURS YOU CAN RECLAIM WEEKLY

Primary Focus: Efficiency (Time Savings) + Faster Invoicing/Cash Flow

# Impact-Effort Matrix

Your pain points are mapped by business impact and implementation effort. This audit focuses on Quick Wins — the highest value for the least effort.



## Quick Wins (High Impact, Low Effort)

- Paper job tickets retyped at night → techs submit digital job tickets from their phones
- Missed calls and callbacks slipping → instant automatic text-back on every missed call
- Quotes emailed with zero follow-up → automatic follow-up reminders on every unanswered quote
- Every booked job entered twice (Calendar + Excel) → one entry auto-syncs to the other

# Recommended Solutions

## **1** Paper tickets → late-night QuickBooks entry, invoices 3–5 days late

**Recommended: Jotform**

Techs fill a mobile job-ticket form on-site, so job data arrives digitally the moment the job closes instead of on paper at night.

Some setup • \$34-39 • 1-2 hrs • **2 hrs/wk saved**

## **2** Missed calls and missed callbacks (6–8 hrs of Karen's week)

**Recommended: OpenPhone (now Quo)**

Business phone line that automatically texts back every missed call, so leads get an instant response instead of waiting on a callback.

Some setup • \$15-30 • 1-2 hrs • **2 hrs/wk saved**

## **3** No follow-up on emailed quotes — jobs quietly lost

**Recommended: Boomerang for Gmail**

Automatically resurfaces any quote email that hasn't received a reply after a set number of days, so no quote fades away unfollowed.

Plug-and-play • \$5-15 • 15 min • **1 hr/wk saved**

## **4** Double entry of every booked job into Google Calendar and Excel (~2 hrs/day)

**Recommended: Zapier**

Connects Google Calendar to the Excel job tracker so a job entered once is copied to the other system automatically.

Some setup • \$20-30 • 1-2 hrs • **3 hrs/wk saved**

# Your 4-Day Quick Wins Plan

**1**

## Day 1

Install and set follow-up reminders on all outgoing quote emails

*Boomerang for Gmail*

**2**

## Day 2

Set up the business line and turn on missed-call auto-text replies

*OpenPhone (now Quo)*

**3**

## Day 3

Build the digital job-ticket form and roll it out to the technicians' phones

*Jotform*

**4**

## Day 4

Build the sync between Google Calendar and the Excel job tracker, plus a job-ticket-to-QuickBooks draft-invoice flow

*Zapier*

# What Comes After Quick Wins

Higher-effort projects worth tackling once the quick wins are in place.

**01**

Migrate to an all-in-one field service platform (e.g. Jobber or Housecall Pro) — quotes, scheduling, dispatch, and invoicing in one system with QuickBooks sync

**02**

AI phone answering for overflow and after-hours calls so Karen never misses a lead

**03**

Facebook lead capture connected to an automated booking and follow-up flow

# Financial Impact

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Weekly Time Returned

**8 hrs**

Monthly Net ROI

**\$1,618**

**Total monthly tool cost: \$114**

*Estimate based on the hourly value of your time vs. monthly tool spend.*

# Your Next Steps



## 1. Implement the 4 Quick Wins

Follow the plan exactly as outlined to reclaim time and stabilize operations.



## 2. Schedule your 30-minute review call

We'll review results, validate the wins, and decide if deeper automation is worth it.



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