PREPARED FOR SAMPLE COMPANY

SAMPLE

Where the hours go at Harbour & Pine Mechanical

A made-up heating and plumbing company, used to show what a real review looks like.
Owner-run, 24 people, 3 office staff, 14 trucks.

LOOKED AT	TALKED TO	TOOLS TODAY	PHONE
2 weeks of work	Owner, office, 2 techs	QuickBooks, Excel	One main line

A normal week, by the hour

WORK DONE BY HAND	WHO	HOURS A WEEK
Writing quotes after hours, from notes and photos	Owner	9
Calling back missed calls, often the next morning	Office	6
Copying job sheets into the spreadsheet and QuickBooks	Office	7
Chasing quotes that went quiet	Owner	3
Working out who still owes what	Office	4
Total		**29**

What to fix first

A **Quotes from a phone, priced from your own rates**
The tech fills in the job on site. The quote goes out in minutes, with the photos attached.
About 9 h back
Custom software

B **Every call answered and booked**
Calls you miss get answered, booked into the calendar, and written up for the office.
Fewer lost jobs
AI phone answering

C **Job sheets go straight into QuickBooks**
No copying by hand. Invoices go out the day the job closes.
About 7 h back
Automation

HARBOUR & PINE MECHANICAL SAMPLE COMPANY

SAMPLE

The plan, in plain words

STAYS AS IT IS

- QuickBooks for the books
- Microsoft 365 for email
- The main phone number
- How the crews already work

LEFT TO PEOPLE

- Pricing a big custom job
- Any customer who asks for a person
- Final say on every quote over a set amount

Risks, written down

RISK	PLAN
A wrong price goes out	Quotes over a set amount wait for the owner's OK
Customer data leaves the company	Data stays private, in the company's own accounts
The team does not use it	Built around the job sheet they already fill in

Before anything is signed

A working sample: the quote screen, set up with three of your real jobs, running on your own phone.

Phases

PHASE	WHAT YOU GET
1	Quotes from the phone, with the owner sign-off
2	Calls answered and booked into the calendar
3	Job sheets into QuickBooks, a weekly view of what is owed

Each phase has a fixed price, quoted on its own. **Stop after any phase and keep the work.** This review is yours to use with us, with another team, or on your own.