

SAMPLE REPORT • FICTIONAL BUSINESS

AI TOOLS ASSESSMENT

Prepared for Kestrel Ridge Painting

ASSESSMENT DATE

September 25, 2026

BUSINESS TYPE

Residential painting • 7 people

PRIMARY FOCUS

Efficiency

WHERE WE ARE • WHERE WE'RE GOING

EXECUTIVE SUMMARY

THE PAIN

"The nights. Writing the estimates at the kitchen table." Six estimates a week with 35 minutes of typing each, then 30 minutes of crew texts every night.

THE OUTCOME

"Eat dinner with my kids without the laptop open." We claim less than you told us. The rest stays yours to win back.

5.5

Hours you can reclaim every week

PRIMARY FOCUS

EFFICIENCY

RECOMMENDED SOLUTIONS

01 CLAUDE PRO

Talk your walk notes into your phone. The estimate comes back drafted in your own format.

COST	\$20/mo
SETUP	15 min
SAVES	2.0 hrs/wk

02 CLAUDE PRO CREW CARD

One card per job: address, rooms, colors, prep. Each night's crew text becomes a paste.

COST	\$0 more
SETUP	10 min
SAVES	1.5 hrs/wk

03 QUICKBOOKS "CREATE INVOICE"

Rosa turns the accepted estimate into the invoice instead of decoding job sheets.

COST	Already paid
SETUP	5 min
SAVES	1.0 hr/wk

04 SHERWIN-WILLIAMS PRO+ APP

Reorder last week's order from the app already on your phone, with no callbacks.

COST	\$0
SETUP	10 min
SAVES	0.5 hr/wk

05 GMAIL TEMPLATES

Save your answers to the questions every customer asks. Insert them instead of retyping.

COST	Free
SETUP	10 min
SAVES	0.5 hr/wk

START THIS WEEK

YOUR 4-DAY QUICK WINS PLAN

1

DAY ONE

Turn on templates and save your answer to "what do I move before you come?"

TOOL · **GMAIL
TEMPLATES**

2

DAY TWO

Subscribe, load three past estimates, and talk through tomorrow's first walk.

TOOL · **CLAUDE PRO**

3

DAY THREE

Turn one accepted estimate into a crew card. Gate codes stay out.

TOOL · **CLAUDE PRO**

4

DAY FOUR

Reorder last week's paint from the app already on your phone.

TOOL · **PRO+ APP**

THE BOTTOM LINE

FINANCIAL IMPACT

MONTHLY NET ROI

\$2,345

$(5.5 \text{ hrs} \times \$100 \times 4.3) - \$20 \text{ in tools}$

WEEKLY TIME RETURNED

5.5 hrs

4.5 yours, 1.0 Rosa's

TOTAL MONTHLY TOOL COST

\$20

Claude Pro. Everything else you already own.