



TECHNOLOGY REVIEW AND PLAN

Example Comfort Air & Plumbing

Heating, cooling and plumbing repair · 6 people · comfortair-example.com

PREPARED FOR

Dana

DATE

November 2, 2026

PREPARED BY

Toolbelt Index

Your technology partner

AT A GLANCE

● **4** covered ● **7** partly in place ○ **4** gaps

15 categories checked · 4 numbers from your own business · 3 fixes with real tools · a 30-day plan

EXAMPLE

Not a real customer. The business, the owner and every number in this report are made up.

INSIDE

What this report covers

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What this is

A full look at where Example Comfort Air & Plumbing stands with technology today, and what to do about it first. It starts from what you already use, checks every area a business like yours might need, and ends with a 30-day plan you can start on Monday.

A home-service business doing heating, cooling and plumbing repair. Six people: the owner, one office person, two HVAC techs, one plumber and a helper. Today they run on QuickBooks, a shared cell phone, paper estimates and a whiteboard. This report is based on the intake form and the 45-minute call.

How to read the marks

- Covered

Something is in place and working for your business.
- 🕒 Partly in place

Something is in place, but a step is still done by hand or left out.
- Gap

Nothing is in place, and it matters for a business like yours.
- ⦿ Not needed

Listed, but not scored for your business.
- The marks describe your business, not the tools. Where we name tools, they are listed A to Z.

WHAT WENT INTO IT

Your intake form Your tools, your numbers, and your logo, brand color and website, which are on every page.	A 45-minute call How the business runs on a normal week, and where it slips.	Our tool directory Facts and prices from toolbeltindex.com, each with the date we checked.
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EXECUTIVE SUMMARY

4 areas are covered, 7 are partly in place and 4 are gaps.

Three habits slow the business down: calls that go to voicemail, quotes that sit and invoices typed on Friday. Four areas already work, and we leave them alone.

11**missed calls a week**

Your goal: 4

3 of 10**quotes followed up within 2 days**

Your goal: 8 of 10

18 days**to get paid, on average**

Your goal: 10 days

**CHOSEN FROM YOUR
INTAKE****New Google reviews in the last 4 weeks: 2.** Your goal: 6.

WHAT WE FOUND

Across the 15 categories that apply to your business, 4 are covered, 7 are partly covered and 4 are gaps. 5 more are not needed right now.

Your own numbers show where things slip: calls, quote follow-up and getting paid.

The three fixes go in this order: calls, quote follow-up, then invoicing from the visit. Each one has real tools to look at, with the price as listed.

Payroll, time tracking, safety paperwork and van stock are already working. We leave them alone.

QuickBooks stays. Check each match's QuickBooks sync before choosing.

FIX FIRST**FIRST****Answer every call****OFF YOUR PLATE**

The callbacks, and being the only person who can pick up.

SET-UP TIME (ESTIMATE)

About 1 day

NEXT**Follow up on every quote****OFF YOUR PLATE**

Remembering who to chase, and typing each quote twice.

SET-UP TIME (ESTIMATE)

1 to 2 days

THEN**Invoice from the visit****OFF YOUR PLATE**

The Friday typing session, and chasing checks.

SET-UP TIME (ESTIMATE)

2 to 3 days, including your customer list

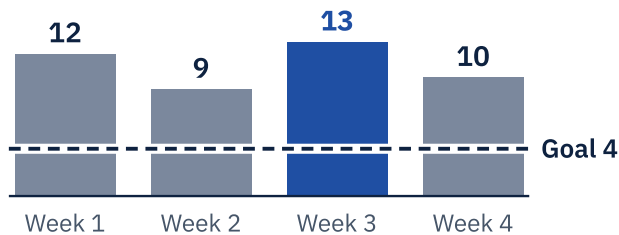
Page 9 has real tools for each, listed A to Z with prices as listed. Page 11 lays out your first 30 days.

FINDINGS

Calls, quotes and invoices are where the business slips.

Each number is yours. The darker bar or dot is the one that stands out, and the dashed line is the goal you set on our call. A goal is a target, not a promise.

About 11 calls a week go unanswered. Your goal is 4.



WHAT IT TELLS US

Calls come in while the techs are on a roof and the office person is on another line. Some callers do not leave a message and try the next business on the list.

WHERE IT CONNECTS

Call Answering & Receptionist is a gap in your 360 assessment. Fix one covers it.

Only 3 of the last 10 quotes got a follow-up within 2 days. Your goal is 8.



Filled = followed up within 2 days

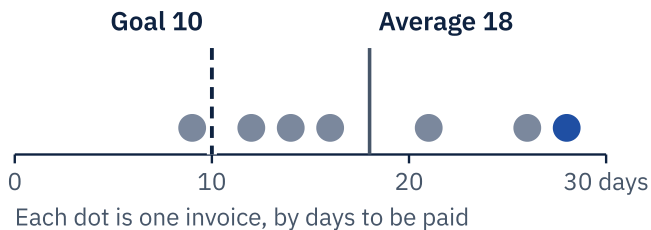
WHAT IT TELLS US

Estimates are written on paper, typed up later and emailed. If the homeowner does not answer, the quote sits.

WHERE IT CONNECTS

Estimating & Takeoffs is partly covered and Proposals & Bids is a gap. Fix two covers both.

An invoice takes 18 days to be paid, on average. Your goal is 10.



WHAT IT TELLS US

The tech's notes are typed into QuickBooks at the end of the week, and checks come back by mail. Invoices go out days after the visit, so money comes in days later too.

WHERE IT CONNECTS

On-site Payments is a gap and Bookkeeping & Invoicing is partly covered. Fix three covers both.

New Google reviews in the last 4 weeks: 2. Your goal is 6.



CHOSEN FROM YOUR INTAKE

You said on the intake that more reviews from happy customers is the number you would most like to watch.

COUNTED FROM

Your Google business page. You confirmed on the call that we track it each month.

YOUR 360 ASSESSMENT

7 areas are partly in place and 4 are gaps.

The categories are the ones we use to organize tools on toolbeltindex.com. Each is marked for your business as it runs today.

GET FOUND AND WIN WORK

Lead Generation	Partly in place
Website & SEO	Partly in place
Marketing & Content	Partly in place
Reviews & Reputation	Partly in place

GET PAID

Bookkeeping & Invoicing	Partly in place
On-site Payments	Gap
Payroll	Covered

ANSWER AND QUOTE

Call Answering & Receptionist	Gap
Estimating & Takeoffs	Partly in place
Proposals & Bids	Gap
Scheduling & Dispatch	Partly in place

RUN THE BUSINESS

Crew Time Tracking	Covered
Safety Paperwork	Covered
Parts & Inventory	Covered
AI Agents & Automation	Gap

Covered Partly in place Gap

Not needed right now. Takeoffs, Fleet Tracking, Design & Visualization, Project Management, Vibe Coding / Build-Your-Own.

WHAT THE MARKS MEAN FOR THE PLAN

4 covered Working. We leave these alone.	7 partly in place Worth a look, once the first three fixes are in.	4 gaps The first three fixes cover most of these.
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YOUR 360 ASSESSMENT

Why each area is marked the way it is.

Lead Generation

● Partly in place

Leads come from referrals, Google and a web page that lists a phone number. On busy days nobody replies within the hour, so some of those leads go to the next truck.

Website & SEO

● Partly in place

The site lists services and a phone number. It has no online request form and is not set up for each town you serve.

Marketing & Content

● Partly in place

The Facebook page gets posts when someone has time. Photos of finished work stay on phones and do not reach posts or follow-up messages.

Reviews & Reputation

● Partly in place

Dana asks happy customers for a Google review in person. No message goes out after the visit, so asks depend on memory.

Call Answering & Receptionist

○ Gap

One shared cell phone carries every call. When the techs are on a roof and the office person is on another line, the call goes to voicemail, and some callers do not leave a message.

Estimating & Takeoffs

● Partly in place

Estimates are written on paper at the house and typed up later. They go out, but a day or two after the visit.

Proposals & Bids

○ Gap

A quote is a PDF in an email. The customer cannot approve it from the message, so approval comes back by phone, or not at all.

Scheduling & Dispatch

● Partly in place

A whiteboard in the office works for six people. Customers do not get a reminder text, and the techs read the next address from a group text.

YOUR 360 ASSESSMENT

Why each area is marked the way it is, continued.

Bookkeeping & Invoicing

● Partly in place

QuickBooks is in place and the books are clean. Invoices are typed in at the end of the week, so they go out days after the visit.

On-site Payments

○ Gap

Techs take checks at the door. Card payments happen later, when the office calls the customer.

Payroll

● Covered

Payroll runs through a service the bank offers. Pay and taxes are handled on schedule. Nothing to change.

Crew Time Tracking

● Covered

A free time clock app on each phone. Hours are ready before payroll. Nothing to change.

Safety Paperwork

● Covered

A paper checklist rides in each van and gets used. It works for a team this size.

Parts & Inventory

● Covered

A parts sheet is checked each Friday and the vans are restocked. Nothing to change this month.

AI Agents & Automation

○ Gap

Information gets typed twice: from the paper ticket into QuickBooks, and from call notes into a text. Nothing moves between systems on its own yet.

NOT NEEDED RIGHT NOW

Takeoffs. Service calls do not need plan takeoffs.

Design & Visualization. Repair work does not need design or visualization tools.

Vibe Coding / Build-Your-Own. Building your own tools is not a need today.

Fleet Tracking. Three vans. The office knows where they are with a phone call.

Project Management. Visits are same-day or next-day, not multi-week projects.

INVENTORY

10 tools and habits run the business today.

WHAT YOU USE	WHAT IT DOES FOR YOU	CATEGORIES IT TOUCHES	NOTES
QuickBooks	Books and invoices	Bookkeeping & Invoicing	The books are clean. Invoices are typed in at the end of the week.
Shared cell phone	Every call and text	Call Answering & Receptionist, Lead Generation	One phone, one person at a time. Texts and calls sit in the same inbox as personal messages.
Paper estimate pad	Quotes at the house	Estimating & Takeoffs, Proposals & Bids	Written at the house, typed up later and emailed as a PDF.
Whiteboard, group text	The schedule	Scheduling & Dispatch	Works for six people. Customers do not get a reminder text.
Facebook, Google profile	Getting found	Marketing & Content, Reviews & Reputation	Posts go up when someone has time. Reviews are asked for in person.
Website by a friend	Services, phone	Website & SEO	No online request form.
Free time clock app	Crew hours	Crew Time Tracking	Hours are ready before payroll.
Bank payroll service	Payroll and taxes	Payroll	Runs on schedule.
Parts spreadsheet	Van stock	Parts & Inventory	Checked each Friday, vans restocked.
Paper van checklists	Safety paperwork	Safety Paperwork	In every van and used.

WHERE THINGS OVERLAP

Customer names and phone numbers live in three places: the cell phone, the paper pad and QuickBooks. When one changes, the others do not.

The group text and the whiteboard both hold the schedule. A change made in one has to be remembered in the other.

Prices live on the paper pad and in QuickBooks. Nothing keeps the two in step.

WHERE THERE ARE GAPS

Call Answering & Receptionist. Nothing in the list above covers it.

Proposals & Bids. Nothing in the list above covers it.

On-site Payments. Nothing in the list above covers it.

AI Agents & Automation. Nothing in the list above covers it.

TOOL MATCHES

Tools for the first fix.

Tools are listed A to Z. Prices are as listed on each tool's own site on the date shown. They change, so check before you buy.

First: Answer every call

Set-up time (estimate): About 1 day

Avoca AI answering and booking aimed at home-service companies.	Price on request. Avoca does not publish prices. Trial: No free trial is published. Checked Oct 20, 2026	A day with it: A homeowner calls about no heat, and the voice agent asks what is wrong and offers a time. The office still checks that booking against the real board. Watch for: A voice agent still needs your scripts, your service area, and a human backup.
My AI Front Desk AI receptionist for service businesses that need calls answered and booked.	\$99/mo, or \$79/mo billed annually. Includes 200 voice minutes, 100 chats and 400 texts. Trial: No free plan; Frontdesk says there are no contracts and you can cancel anytime. Checked Oct 20, 2026	A day with it: After hours, the AI asks for the address and the problem and offers a window the office set. Listen to real calls before you point the main number at it. Watch for: Test it on your real services and zip codes before you point the main number at it.
Quo Shared business phone, formerly OpenPhone, with AI on calls and messages.	Starter is \$19 per user per month, or \$15 per user per month billed yearly. Trial: 7-day free trial. Checked Oct 20, 2026	A day with it: The owner and the office share one business number, and the text thread stays with the customer. A missed ring still needs a person or a receptionist behind it. Watch for: Not built around a pricebook, a tech schedule, or a trade.
Smith.ai Virtual receptionists and AI answering for small businesses.	Starter is \$300/mo for 30 calls, with \$11.50 per extra call. Trial: No free trial; Smith.ai offers a 30-day money-back guarantee (up to \$1,000). Checked Oct 20, 2026	A day with it: The main number rings while the crew is on a roof, and a receptionist takes the message or books the slot. The office sees a lead instead of a missed-call voicemail. Watch for: Per-call or plan pricing needs a look at your actual volume.

HOW TO READ EACH TOOL

Price and trial As listed by the tool on the date shown. Check the tool's own site before you buy.	A day with it How the tool fits a normal day in your business, in your terms.	Watch for The one thing to check before you commit, so there are no surprises.
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TOOL MATCHES

Tools for the next two fixes.

Tools are listed A to Z. Prices are as listed on each tool's own site on the date shown. They change, so check before you buy.

Next: Follow up on every quote

Set-up time (estimate): 1 to 2 days

Housecall Pro Home-service software with AI tools inside scheduling, invoicing, and the phone.	Billed annually: Basic \$59/mo (1 user), Essentials \$149/mo (5 users), Max \$299/mo (8 users). Month to month: \$79, \$189 and \$329. Trial: 14-day free trial with full access to the Max plan, no credit card required. Checked Oct 20, 2026	A day with it: The office books a drain call from the website while the tech is still on the last call. The call lands on the board, and the invoice follows that ticket. Watch for: You are buying a full FSM, not a single-purpose AI add-on.
Jobber Field service software with built-in AI for small home-service teams.	Annual prepaid list prices: Core \$29/mo (1 user), Connect from \$99/mo, Grow from \$149/mo. Extra users are \$29/mo each. Month to month runs higher. Trial: 14-day free trial with full access to the Grow plan, no credit card required. Checked Oct 20, 2026	A day with it: A dispatcher drops tomorrow's calls on the board and sends the quote the tech wrote in the driveway. The invoice goes out from that same visit. Watch for: AI is part of a paid field-service subscription.
Workiz Field service software that markets itself as AI for home-service pros.	Price on request. Workiz lists Standard, Pro and Ultimate plans without dollar amounts. Trial: 7-day free trial with no credit card required; demos can be booked. Checked Oct 20, 2026	A day with it: The owner assigns the next call from the phone, and the tech clocks in when they arrive. The invoice goes out from that visit. Watch for: Feature packaging changes. Read the current plan before you assume a feature is included.

Then: Invoice from the visit

Set-up time (estimate): 2 to 3 days, including your customer list

Housecall Pro	Listed above under "Follow up on every quote". Same price and notes.	
Jobber	Listed above under "Follow up on every quote". Same price and notes.	
QuickBooks Small-business accounting with Intuit's AI assistant built in.	QuickBooks Online list prices: Simple Start \$38/mo, Essentials \$85/mo, Plus \$140/mo. Payroll and payments carry separate fees. Trial: 30-day free trial on paid plans; phone support is free during the trial. Checked Oct 20, 2026	A day with it: The bookkeeper matches the week's deposits to invoices the field software already sent. This is where the month closes, not where the next call is assigned. Watch for: It will not schedule a tech or measure a roof.

YOUR PLAN

Four weeks, one step at a time.

A week at a time. Business Partner covers the fixes and small changes each month. Set-up times are estimates, and your week-four recount tells us what actually moved.

Week 1

Nov 2 to Nov 8

Set up call coverage

WE DO

Shortlist two call tools from the matches. Set up a trial with your service area, hours and the questions to ask. Listen to test calls with you.

YOU DO

Send the list of services and zip codes you cover. Keep the missed-call tally going.

YOU WILL KNOW IT WORKED WHEN

Test calls sound like your business.

Week 2

Nov 9 to Nov 15

Put quotes on a clock

WE DO

Set up one field-service trial for quotes and invoices. Move your customer list over. Build quote templates for your five most common repairs.

YOU DO

Pick the five repairs and the prices you use today.

YOU WILL KNOW IT WORKED WHEN

Every quote sent this week has a follow-up set.

Week 3

Nov 16 to Nov 22

Invoice from the visit

WE DO

Turn on invoicing and card payments for one tech. Check that it syncs with QuickBooks.

YOU DO

Send the first invoices from the driveway. Tell us what slowed you down.

YOU WILL KNOW IT WORKED WHEN

First invoices out the same day.

Week 4

Nov 23 to Nov 30

Count again and decide

WE DO

Recount your numbers with you. Hold the monthly call. Send the summary by the 5th showing then and now.

YOU DO

Share the new counts. Choose what to keep, change or add.

YOU WILL KNOW IT WORKED WHEN

Then-and-now table filled in with your own counts.

YOUR NEXT STEP

You choose what happens after this.

Your \$500 credit goes toward whichever you pick. It is applied once.

Keep the partner going

\$500 a month, cancel anytime. A short call each month, a written summary by the 5th that shows how your numbers changed, fixes and small changes, and email questions answered within 2 business days.

We'll set it up

\$2,500, once. We set up the tools from fixes one to three, move your customer list over and test them with you.

We'll build an agent

Packages from \$2,000 for Follow-Up, with a monthly fee that already includes Business Partner, so you don't pay both.

Cancel anytime. If your first month isn't useful, we'll refund it when you ask within 14 days after we send this plan. We don't refund anything beyond 30 days.

Your numbers, every month

Each monthly summary uses this same layout. It repeats your numbers, with then and now side by side, and updates the 360 marks as things move from gap to partly to covered. The goals stay yours.

NUMBER	THEN	NOW	YOUR GOAL
Missed calls per week	11	Counted next month	4
Quotes followed up within 2 days	3 of 10	Counted next month	8 of 10
Days to get paid	18	Counted next month	10
New Google reviews in the last 4 weeks Chosen from your intake	2	Counted next month	6

Always independent. We recommend what fits your business.

APPENDIX

How we counted and marked.

Missed calls per week	A tally of calls nobody could pick up, taken from the phone's call log or a mark on a sheet by the phone, for 4 weeks in a row. The average is the total divided by the weeks counted.
Quotes followed up within 2 days	Of the last 10 quotes sent, how many got a call, text or email from you within 2 days of sending.
Days to get paid	For the last 7 invoices, the days from the day the work was done to the day the payment arrived. The average is the total divided by the invoices counted.
New Google reviews in the last 4 weeks Chosen from your intake	You said on the intake that more reviews from happy customers is the number you would most like to watch. Counted from your Google business page. We count it the same way each month.
The 360 marks	Each category is marked from what you told us on the intake form and the call: what you use, what is done by hand and what is missing. We mark the business, not the tools.
Tool facts and prices	From our directory at toolbeltindex.com , taken from each tool's own site on the date shown. Where a price is not published, we say Price on request.
Set-up times	Estimates from how long similar changes take a team this size. Yours may be shorter or longer.

These are your numbers.

Every number in this report is Dana's own, counted from the business. We did not estimate or invent any. The numbers we track each month are the ones you confirm on the call. If something cannot be counted yet, the report says "Not yet measured" and we count it together in month one. Goals are set by you on the call. They are targets, not promises of what you will get.

EXAMPLE Not a real customer. The business, the owner and every number are made up to show how a report reads.