



# Example Comfort Air & Plumbing

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

Prepared for Dana · November 2, 2026 · By Toolbelt Index, your technology partner

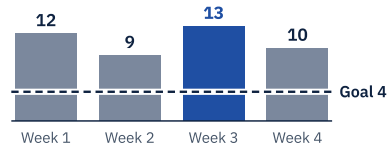
**EXAMPLE** Not a real customer. The business, the owner and every number are made up. Your logo, brand color and website go on every page.

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.

## WHERE THINGS SLIP

Your starting numbers, from your own business

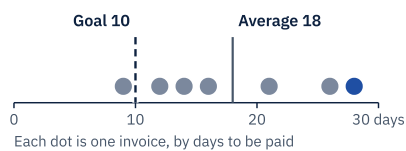
About 11 calls a week go unanswered. The goal is 4.



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



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



## CHOSEN FROM YOUR INTAKE

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

## WHERE YOU STAND, ALL AROUND

Ten tools run the business, and customer details live in three places.

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

● Covered ● Partly in place ○ Gap

### GET FOUND AND WIN WORK

**YOU USE**  
Facebook, Google profile;  
Website by a friend

- Lead Generation
- Website & SEO
- Marketing & Content
- Reviews & Reputation

### ANSWER AND QUOTE

**YOU USE**  
Shared cell phone; Paper  
estimate pad; Whiteboard, group  
text

- Call Answering & Receptionist
- Estimating & Takeoffs
- Proposals & Bids
- Scheduling & Dispatch

### GET PAID

**YOU USE**  
QuickBooks; Bank payroll service

- Bookkeeping & Invoicing
- On-site Payments
- Payroll

### RUN THE BUSINESS

**YOU USE**  
Free time clock app; Parts  
spreadsheet; Paper van  
checklists

- Crew Time Tracking
- Safety Paperwork
- Parts & Inventory
- AI Agents & Automation

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

## FIX FIRST

Tools listed A to Z. Prices are in the full plan.

Start with calls, then quotes, then invoices.

### FIRST

#### Answer every call

SET-UP (ESTIMATE) About 1 day

**TODAY** A call at 4 PM goes to voicemail.  
**AFTER** A call at 4 PM is answered and a window is offered.

TOOLS, A TO Z

Avoca · My AI Front Desk · Quo · Smith.ai

### NEXT

#### Follow up on every quote

SET-UP (ESTIMATE) 1 to 2 days

**TODAY** A quote sits until the homeowner calls back.  
**AFTER** A quote gets a follow-up message on day two.

TOOLS, A TO Z

Housecall Pro · Jobber · Workiz

### THEN

#### Invoice from the visit

SET-UP (ESTIMATE) 2 to 3 days, including your customer list

**TODAY** The invoice is typed in on Friday.  
**AFTER** The invoice goes out from the visit.

TOOLS, A TO Z

Housecall Pro · Jobber · QuickBooks

**Your next step.** Keep the monthly partner going at \$500 a month, have us set it up for \$2,500, or have us build an agent. Your \$500 credit goes toward whichever you pick.

Always independent. We recommend what fits your business.