SAMPLE · FICTIONAL COMPANY

AI OPERATIONS ASSESSMENT

# Harbor Point Remodeling LLC

Residential remodeling and additions, Broward County. What the assessment covers: lead intake through final payment, the office, and the two crews.

Period reviewed: the last four quarters · Prepared: September 2026 · Prepared by theWorkEdge.ai for the owner, Ray Delgado

**OVERALL SCORE**
**2.4 / 5**
Five areas, same scorecard every client gets

**WHAT WAITING COSTS**
**$215,000**
per year, from the owner's own figures

**FIRST VISIBLE RESULT**
**Day 14**
quote follow-up rule, no software needed

## Summary


Ray asked for one thing on the call. His words: **"I want to stop losing jobs to people who are worse than us but faster than us."** The business does good work and wins when it gets in front of the homeowner. It loses before that point: estimates take nine days on average to leave the office, and forty-one percent of sent estimates never get a second touch.

The largest recoverable dollars sit between first contact and signed contract, so the first thing to build is the Lead-to-Contract Engine (from the first call to the signed contract; an engine is our name for one finished piece), in the form that fits project work: estimate turnaround, quote follow-up, and the contract steps. Before any tool is added, two process changes remove most of the delay. Those come first. Then five connections are built between the tools already in the office, among them leads into one follow-up list, the estimate into the contract and into QuickBooks without retyping, and QuickBooks into a morning report for Ray. The page titled "What gets connected" shows each one.

The finding that will surprise Ray: the pile of estimates waiting is not an estimator problem. It is a site-visit scheduling problem. Estimates wait an average of five days for a site visit that could be booked on the first call.


> *"Every estimate is a Saturday. I do them at the kitchen table because the week is gone by Friday."* **— Ray, working session**

BUSINESS PROFILE

# How the business runs today

Harbor Point Remodeling LLC does kitchens, baths, additions, and garage conversions for homeowners in Broward County. Fourteen people: Ray, an office manager, an estimator who also runs projects, two crew leads, eight field staff, and a part-time bookkeeper.

Leads come from Google, a referral network of two realtors, and repeat customers. The office runs on QuickBooks Online, a shared Google Drive, text messages, and a whiteboard for the schedule.

| Job size and margin, owner's figures | |
|---|---|
| Annual revenue | $4.2 million |
| Jobs per year | 96 |
| Average job value | $43,750 |
| Gross margin | 31% |
| Estimates sent per year | 238 |
| Jobs won from estimates (13 more are repeat or change-order jobs) | 83 |
| Estimate win rate, all jobs together | 35% |

FROM FIRST CALL TO FINAL PAYMENT

# Eight stages, three of them need attention

**1. Inquiry** — Calls to Ray's cell. Web form to a shared inbox.

**2. Site visit** — Booked by text, avg 5-day wait.

**3. Estimate** — Built in a spreadsheet, avg 9 days out.

**4. Follow-up** — 41% of estimates never touched again.

**5. Contract** — Word doc, printed, signed on site.

**6. Build** — Crew leads run it well.

**7. Invoice** — Draws invoiced late, avg 6 days.

**8. Close** — No review ask. Referrals by chance.

Working well · Room to improve · Needs attention

> *"By the time my number gets there, the homeowner has two cheaper ones in hand."* — **Ray**

SCORE IN FIVE AREAS

# Where the business stands, 1 to 5

| Area | Score | Evidence from the call |
|---|---|---|
| **How you win work** | 2 | Leads land on Ray's cell and a shared inbox; source not tracked. Estimates average 9 days. No follow-up system. "I follow up when I remember, which is never." |
| **How customers experience you** | 3 | Crew leads give updates on site. Office hears about changes late. Handoff from estimate to crew is a phone call and a printed contract. |
| **How the office runs** | 2 | Ray books site visits, approves every purchase, and builds every estimate. Schedule lives on a whiteboard. Office manager retypes estimate lines into the contract, then into QuickBooks. |
| **Reputation and growth** | 2 | Twenty-three Google reviews in six years. No review ask at closeout. Two realtor referral sources, unmanaged. |
| **How clearly you see your numbers** | 3 | QuickBooks is current monthly. Draw invoices go out 6 days after the milestone. Per-job margin known at closeout, not during the job. |
| **Overall** | **2.4** | Average of five, one decimal. The two lowest scores sit on the same stretch: first contact to signed contract. |

FINDING 2 OF 6

# Estimates sent without follow-up

| | |
|---|---|
| Estimates sent last four quarters | 238 |
| Followed up within 3 days | 140 (59%) |
| Win rate, followed up | 46% |
| Win rate, not followed up | 19% |
| Estimates with no second touch | 98 |
| Assumed: follow-up recovers one third of the gap (46% − 19%) ÷ 3 | 9% |
| Extra wins, 98 × 9% | 9 |
| Gross margin per win ($43,750 × 31%) | $13,560 |
| **Margin lost per year** | **$122,000** |

STANDARDIZE AUTOMATE Every fix carries a tag: Remove the step, Simplify it, Standardize it (the same way every time), or Automate it (runs on its own, nobody types it).

**What we would do first.** A written rule: every estimate gets a call on day 2 and a text on day 5, from the office manager, not Ray. That is a process change and costs nothing.

**Then, and only then,** the day-2 and day-5 touches run on a schedule from the tools the office already has, and stop the moment the homeowner replies.

Math shown so the owner can check it. The 46% and 19% rates are from the office manager's estimate log; the margin figure is Ray's.

WHERE TIME AND MONEY LEAK

# What waiting costs: $215,000 per year

Each gap is converted to dollars per year using the owner's own figures. Time leaks use hours per week × what that person costs per hour (pay, taxes, and benefits) × 52. Lost jobs use the estimate log and the owner's margin. The last column carries the tag explained under "Estimates sent without follow-up".

| Gap | How it was measured | Per year | Tag |
|---|---|---|---|
| Estimates never followed up | 9 recoverable wins × $13,560 margin (the math is under "Estimates sent without follow-up") | $122,000 | STANDARDIZE |
| Ray builds every estimate | 9 hrs/week × $95 an hour (pay, taxes, and benefits) × 52 | $44,500 | SIMPLIFY |
| Site-visit wait, 5 days | Owner estimates 1 in 12 leads goes cold in the wait: 20 leads × 35% win rate × $13,560, one quarter assumed recoverable | $23,700 | REMOVE |
| Retyping estimate to contract to QuickBooks | 4 hrs/week × $38 an hour (pay, taxes, and benefits) × 52 | $7,900 | AUTOMATE |
| Draw invoices 6 days late | Interest on $1.3 million of draw invoices paid 6 days late, at 8% a year | $1,700 | STANDARDIZE |
| Purchase approvals through Ray | 3 hrs/week × $95 × 52 | $14,800 | REMOVE |
| No review ask at closeout | Not quantified; noted as a growth gap | — | STANDARDIZE |
| **Total, rounded** | | **$215,000** | |

> *"I approve every Home Depot run. Some of them are forty dollars."* **— Ray**

## Team and capacity

Fourteen people, two crews. The office manager has capacity: about 9 hours a week are spent retyping and chasing. The estimator is at capacity and doubles as a project manager, which is why estimates wait. Crew leads are the strongest part of the operation and need nothing from this plan.

## The tools you use today

QuickBooks Online Plus, current. Google Workspace for email and files. Text messages for scheduling. A spreadsheet estimate template that works and should stay. No customer list tool, no scheduling tool, no e-signature. Nothing here needs replacing. Five connections are needed; the page titled "What gets connected" lists them.

THE FIXES, IN PRIORITY ORDER

# Six fixes, process first

Each one is written as People, Process, Tools, in that order. The change to how work is done always comes before any tool.

### 1. Book the site visit on the first call REMOVE STANDARDIZE

**People:** the office manager owns booking; Ray stops. **Process:** two fixed site-visit windows per day on the calendar; the caller picks one before hanging up. **Tools:** a shared calendar the office manager already has. **Outcome:** site-visit wait from 5 days to 1, about $23,700 per year recovered.

### 2. Two-touch follow-up on every estimate STANDARDIZE AUTOMATE

**People:** office manager. **Process:** day-2 call, day-5 text, logged. **Tools:** after 30 days by hand, the two touches run on a schedule and stop on reply. **Outcome:** about $122,000 in margin per year, the largest item in the plan.

### 3. Move estimating off Ray's Saturday SIMPLIFY

**People:** the estimator builds; Ray reviews only jobs over $60,000. **Process:** the existing spreadsheet template with three assemblies pre-priced (kitchen, bath, addition). **Tools:** none new. **Outcome:** estimate turnaround 9 days to 3; 9 hours a week back to Ray.

### 4. Raise the purchase approval floor REMOVE

**People:** crew leads. **Process:** purchases under $500 need no approval; a weekly list goes to Ray. **Tools:** none. **Outcome:** 3 hours a week back; crews stop waiting on a text.

### 5. One entry, three documents AUTOMATE

**People:** office manager. **Process:** the estimate is the source; the contract and the QuickBooks estimate are produced from it, not retyped. **Tools:** the estimate template connected to QuickBooks and to e-signature. **Outcome:** 4 hours a week back; contracts out the same day.

### 6. Ask for the review at final walkthrough STANDARDIZE

**People:** crew lead. **Process:** the review link is on the closeout checklist. **Tools:** a text template. **Outcome:** not quantified; the first ten reviews will show the rate.

SIX-MONTH PLAN

# Three phases, each with a result you can see

**Days 1 to 14: the two-week plan of quick fixes.** Fixes 1, 2 (by hand), and 4. No software. Owner and office manager only. **Expected:** site visits booked on the first call; every open estimate touched twice; Ray's approval queue gone. First visible result: the follow-up log on day 14.

**Days 15 to 90: the first build, the Lead-to-Contract Engine.** Fix 5 and the on-its-own version of 2: one entry for estimate, contract, and QuickBooks; follow-up on a schedule; e-signature; every lead and its source in one list. Built by connecting the tools already in the office. **Expected:** estimate turnaround 3 days; contracts signed same day; the $122,000 loss starts to shrink.

**Days 91 to 180: run and extend.** Fixes 3 and 6 settle in. Draw invoices triggered at milestones. A morning email with cash, unpaid invoices, and the one decision that needs Ray. Watching what was built and small fixes month to month; Ray approves money and contracts, the office runs the rest. **Expected:** per-job margin visible during the job, not after.

TWO-WEEK PLAN OF QUICK FIXES

# Day by day

| Days | Who | What |
|---|---|---|
| 1 to 2 | Ray, office manager | Set two site-visit windows per day for the next six weeks on the shared calendar. Print the follow-up rule and tape it to the monitor. |
| 3 | Office manager | List every estimate sent in the last 45 days with no second touch. Call the top ten by value. |
| 4 to 5 | Ray | Tell the crew leads the new purchase floor. Put the weekly list template in the shared drive. |
| 6 to 10 | Office manager | Book every new inquiry into a window on the first call. Log each estimate's day-2 call and day-5 text. |
| 11 to 13 | Estimator | Price the three standard assemblies in the existing spreadsheet. |
| 14 | Ray | Read the log: estimates touched, wins, site-visit wait. That is the first visible result. |

WHAT GETS CONNECTED

# Five connections, built on the tools already in the office

Nothing here replaces a tool the office uses. The estimate spreadsheet stays. QuickBooks stays. Google Workspace stays. One follow-up and e-signature tool is added for the office manager. The rest connects them, so a job is typed once.

| Connection | From, to | What it replaces | Phase |
|---|---|---|---|
| **1. Leads into one list** | Phone, web form, referral text → follow-up tool | Ray's cell and a shared inbox. Every lead gets a source and a next touch. | Days 15 to 90 |
| **2. Missed call to text-back** | Phone system → follow-up tool | Voicemail. A text goes out in under a minute and books the site visit. | Days 15 to 90 |
| **3. Estimate to contract to QuickBooks** | Estimate spreadsheet → e-signature → QuickBooks customer, estimate, deposit invoice | The office manager retyping the same lines three times. About 4 hours a week. | Days 15 to 90 |
| **4. Milestones to invoices** | Schedule → QuickBooks progress invoice | Draw invoices going out 6 days late. | Days 91 to 180 |
| **5. Books to the morning report** | QuickBooks (seen, never changed) → 6:30 AM email to Ray | Opening QuickBooks at night to find out what is owed and what is due. | Days 91 to 180 |

WHAT STAYS WITH PEOPLE

Every price. Every contract before it is sent. Every payment. Approvals are recorded; a person always sends every payment. Nothing goes to a homeowner without a rule Ray approved.

THE FIRST BUILD, IN RAY'S WORDS

One list of open estimates with days since sent and the next touch due. Contracts that go out from the estimate, not retyped. A site-visit calendar the office fills without him. Quoted in writing after this report; the assessment fee credits in full.

## What this plan does not do

- It does not change how crews build. That is the strongest part of the business.
- It does not replace the estimator's judgment on price. It removes the waiting around it.
- Figures depend on the office manager's estimate log being complete; the two-week review confirms them.

ABOUT THIS SAMPLE

# What is real and what is not

Harbor Point Remodeling LLC and Ray Delgado are fictional. The figures are illustrative and were chosen to be typical of a $4 million residential remodeling contractor in South Florida; they are not drawn from any client.

What is real: the structure, the same five-area scorecard every client gets, the math behind every dollar figure, the process-before-tool order on every fix, and the two-week plan format. A real assessment is built from a recorded working session with the owner, the office manager's logs, and the owner's own numbers, and every score cites a line from that call.

## How a real assessment is produced

1. A 20-minute fit call, then a 50-minute recorded working session.
2. Every process we find tagged Remove, Simplify, Standardize, or Automate.
3. Five areas scored 1 to 5 on the same scorecard every client gets.
4. Every gap converted to dollars per year with the math shown.
5. Five to seven fixes, each written as People, Process, Tools, with the change to how work is done before any tool.
6. A two-week plan of quick fixes the owner can run alone, and a six-month plan.
7. A 30-minute review call on screen-share, seven business days after the working session.

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