Iterategy

AI Operations Audit: Cobble Creek Plumbing and Drain

Prepared for

Cobble Creek Plumbing and Drain

SAMPLE AUDIT

Prepared **2026-09-01**
Order **SAMPLE-COBBLECREEK**

Confidential. Prepared for the named recipient and not for distribution.

Contents

Every section starts on its own page. Page numbers below are the numbers printed at the foot of each page.

1. Read this first 2

2. What we looked at, and how 4

3. The six findings, in payback order 7

4. What we deliberately did not pursue 14

5. What this is worth, and the bar we hold ourselves to 15

6. The first 30 days, in order 16

7. Appendix: our assumptions 17

Bonus A: Getting named when a customer asks an AI assistant 20

Bonus B: A starter AI policy 22

23 pages including the cover. The cover is not numbered, so the numbers above are the ones printed at the foot of each page.

1. Read this first

This sample audit is built on a plumbing company we invented, Cobble Creek Plumbing and Drain, so we can show you what the real thing looks like without spending a customer's numbers to do it. Everything about the business is made up: the owner, the staff, the call log, the quote sheet. Everything about the outside world is real, dated, and sourced so you can check it: the wage data, the profit margins, the software prices, what each tool can and cannot do.

What a customer buys is this. We read your intake form, we ask for the numbers we are missing, we work out where your time and money are going, and we hand you this document. Every finding carries a dollar figure and the arithmetic that produced it, so you can disagree with any single number and rescale the rest yourself instead of throwing out the whole report.

What we found, in the order we would do them.

1. **Big quotes go quiet and nobody owns chasing them.** About 60 large quotes a year, worth roughly $359,700, get no answer either way. Worth **$11,613 to $23,225 a year.**
2. **You check Housecall Pro against QuickBooks by eye every week or two.** Around 3,000 invoices a year, compared by hand. Worth **$4,220 to $13,100 a year.**
3. **After-hours callers reach voicemail, and some of them hire somebody else by morning.** Your own call log says about two and a half a week, confirmed. Worth **$8,438 to $16,031 a year.**
4. **Payroll gets redone by hand on most runs.** Worth **$203 to $813 a year**, and the reason it happens is not the one you have been assuming.
5. **Comfort Club members lapse with nothing chasing the renewal.** 24 lapsed over the last year. Worth **$697 a year** that we can count, and more that we cannot count yet.
6. **Material cost never lands against the job, so you are guessing what each job made.** We put **$0** on this one, deliberately, and Section 3 explains why that is the honest number.

What matters most, and why it is first. Finding 1 is first and it is not because it is the biggest number. It is first because fixing it means switching on a tool that is already inside the Housecall Pro plan you pay for every month. Finding 3 is a bigger single number, but it needs new money and a decision you have already looked at once and said no to. Start where the money is already spent.

The one thing you asked that we want to answer directly. You wrote: how much of all that is the software's fault and how much is us not using it right, I honestly couldn't tell you. Every finding in Section 3 ends with that answer in one word: **setting**, **limit**, or **habit**, with a dated source behind it. Two of the six turned out to be the software's fault in a way you could not have worked out from the outside, and one of those is the payroll problem you have been living with since the summer.

What it adds up to. Between **3.3 and 8.7 hours a week**, most of them yours, and **$25,171 a year** of value with the arithmetic shown. One fix costs money, $5,388 a year, and one fix saves money, $360 a year, so the net is **$20,143 a year**. Even counting only what we're certain of: **$6,840/yr.**

You asked what you would do with ten hours a week back. The honest answer is that we found between three and nine, not ten, and about two thirds of it is your own time rather than Elena's.

One more thing, and it is yours rather than ours. When you added up your software invoices for us, you found you are spending **$482.50 a month**, which is $5,790 a year, and you told us you had never added it up before. That was your arithmetic, not ours. Section 3 finding 2 shows where $360 a year of it comes back for no effort at all, and Section 7 shows what each line costs you today against what the vendor charges a new customer now.

What happens next. Section 6 is a week by week plan you could start on Monday. Your two weeks of questions start the day this arrives: reply to the delivery email and we answer. If you think a number is wrong, tell us which one and we will recompute and send you a corrected copy.

2. What we looked at, and how

What you gave us. Your intake form, submitted 2026-09-01, all 33 answers across the six blocks: the business and its shape, the tools you run, how a job travels from first contact to paid invoice, where things stall, what eats your week and your staff's week, what you have already tried with AI, what you do not want automated, and your rough volumes.

You also offered read-only access to two systems. **We did not take it**, and you should know that, because it changes how much weight the numbers below can carry. Instead we asked you six questions by email and Elena pulled the answers out of Housecall Pro, the Quotes Awaiting Answer sheet and your invoices. **Every customer figure in this report is a number you gave us**, and it is labeled that way wherever it appears. We did not log into anything.

What we counted, and where each count came from.

What	Value	Where it came from
Jobs per week	60	your intake form
Inbound calls per day	30	your intake form
Open quotes per month	45	your intake form
Average job value	$450	your intake form
Comfort Club members	145	your intake form
After-hours calls, two weeks	14 and 11	your Housecall Pro call log, sent by Elena
Voicemails left, two weeks	9 and 7	same
Hangups with no message, two weeks	5 and 4	same
Callers who had already hired somebody	3 of 9, then 2 of 7	same
Big quotes, July and August	26, worth $148,050	your Quotes Awaiting Answer sheet
Big quotes closed	16, worth $88,100	same
Payroll runs, last 4 months	8, of which 5 were done by hand	your bookkeeper
Monthly software invoices	$482.50	your invoices
Comfort Club price, joins, lapses	$199/yr, 38 joined, 24 lapsed	you told us

Anything below that did not come from that table is an assumption, and Section 7 lists every one of them.

As is: how a job travels from first contact to paid invoice.

A customer calls or texts, usually about a leak, a clogged drain or a water heater. If Elena is at her desk she answers, takes the basics and books it in Housecall Pro, normally same day or next day. A tech goes out and diagnoses it. If it is straightforward, he quotes on the spot from his phone and does the work on the same visit. If it is bigger, a repipe or a sewer line, he photographs it, you look at it that night or the next morning, and you call the customer with a number. If they say yes, Elena schedules it. When the work is done the tech closes the job in Housecall Pro, which is supposed to raise the invoice automatically, and the customer pays by card in the app, or you post an invoice on net 30 for the commercial accounts. Every week or two, Elena checks that what is in Housecall Pro actually landed correctly in QuickBooks.

Where data gets retyped between systems.

- Invoice and payment detail between Housecall Pro and QuickBooks, when the sync does not carry it cleanly. This is finding 2.
- Technician hours, when the payroll timesheet route breaks and Dana works off a printed report instead. This is finding 4.
- Material costs, which are ordered from the supply house and never land against the job at all, so per-job profit is estimated rather than calculated. This is finding 6.

Where jobs wait or fall through.

- Between “I called them with a number” and “they said yes” on a big quote. Nobody owns the chase. This is finding 1.
- After hours, when a call reaches voicemail and the caller does not wait until morning. This is finding 3.

Process inventory: the twelve manual workflows that run more than weekly

Hours are per week and are recoverable-before-caps, meaning the time the task takes today, not the time a fix would give back. **Where a row says “not quantified”, we mean it: the intake told us the work happens but not how long it takes, and we would rather leave the cell empty than fill it with a guess.**

#	Process	Trigger	Current tool	Hrs/wk	Maps to
1	Answer and book inbound calls	Customer calls or texts, about 30 a day	Housecall Pro	not quantified	inherent work
2	Morning callbacks from after-hours voicemail	Overnight voicemail	Voicemail, phone	not quantified separately	§3 finding 3
3	Quote small jobs on site	Tech diagnoses on the visit	Housecall Pro mobile	inherent, done well	inherent work
4	Quote big jobs	Tech photographs a repipe or sewer job	Phone, your judgment	not quantified	§4, not pursued

#	Process	Trigger	Current tool	Hrs/wk	Maps to
5	**Track open quotes awaiting an answer**	A big quote goes out	**A spreadsheet**	**0.5 to 1.0 (Elena)**	**§3 finding 1**
6	**Chase quotes that have gone quiet**	Nothing happens for days	Phone, memory	**1.0 to 2.0 (yours)**	**§3 finding 1**
7	Close out the job and raise the invoice	Tech marks the job done	Housecall Pro	inherent, automatic	inherent work
8	Take payment	Invoice issued	Housecall Pro	inherent work	inherent work
9	**Check Housecall Pro against QuickBooks**	Every week or two	By eye	**2.5 to 7.5 (you and Elena)**	**§3 finding 2**
10	**Re-key payroll from a printed timesheet**	Timesheet route fails	By hand into QuickBooks	**0.2 to 0.7 (Dana)**	**§3 finding 4**
11	Estimate job profitability	You wonder what a job made	Your head	not quantified	§3 finding 6
12	Keep the on-call rota and truck stock	Weekly	A spreadsheet	not quantified	§4, not pursued
	Total quantified			**4.2 to 11.2**	

Four of twelve rows carry hours. Eight do not, and here is the honest reason for each. Rows 1, 3, 7 and 8 are inherent work: answering the phone and quoting a job is the business, not an overhead to be removed, so their hours would not belong in a recovery total even if we had them. Row 2 is counted, but in finding 3 rather than here: the morning callbacks are the after-hours problem, and timing them in both places would count the same hours twice. Rows 4, 11 and 12 are activities your intake describes but does not time, and none of the six questions we sent you asked for their duration. If you want them counted, tell us during your question window and we will recompute at no charge.

The total in that table is larger than the total in Section 5, and it should be. This table is the time the work takes now. Section 5 counts only the portion a fix can realistically remove, after the caps in Section 7 are applied.

3. The six findings, in payback order

Ranked by return per hour of your effort, not by size. Every finding ends with the same one-word answer to your own question: is this a **setting** somebody never switched on, a **limit** in the product itself, or a **habit** the tools would happily support you changing.

Finding 1: Big quotes go quiet, and nobody owns the chase

Worth $11,613 to $23,225 a year. Confidence: High on the labor, Medium on the recaptured work.

What it is. Elena keeps a spreadsheet called Quotes Awaiting Answer. That spreadsheet is your actual sales record, and you told us so yourself: it “lives entirely in her head and one spreadsheet”. You named chasing quotes as the single biggest thing eating your week, Elena named tracking them as the biggest thing eating hers, and you named it again as the place work stalls. Three of your own answers point at the same object.

What it costs you now.

```
The labor of doing it by hand:
  you    1.0 to 2.0 hr/wk x $51/hr x 50 weeks = $2,550 to $5,100
  Elena  0.5 to 1.0 hr/wk x $29/hr x 50 weeks = $  725 to $1,450
                                       total  = $3,275 to $6,550/yr
  recoverable at 80%                          = $2,620 to $5,240/yr

The work that never closes because nobody followed up, from your own sheet:
  July     46 quotes, 14 big, $79,300 quoted, 9 closed (64%) worth $48,900
  August   43 quotes, 12 big, $68,750 quoted, 7 closed (58%) worth $39,200
  two months: 26 big quotes out, 16 closed, 10 unanswered worth $59,950
  over a year: about 60 unanswered big quotes worth $359,700, averaging $5,995 each
  at 5% recaptured:  3 more jobs = $17,985 of work x 50% gross margin = $8,993/yr
  at 10% recaptured: 6 more jobs = $35,970 of work x 50% gross margin = $17,985/yr
```

We are allowed to claim six times more than we have, and we are not going to. The rules we work to would let us model recapturing 30% of unanswered quotes, which would be 18 jobs and $107,910 of work. We modeled 5%. The reason is in your own numbers: your close rate on big jobs is already about 60%, and that already includes the late yeses that come in after you chase somebody. The easy recaptures are inside your existing rate. What a follow-up schedule adds is only the ones lost to silence rather than to a decision. Three extra big jobs a year, one every four months, is what we will defend.

The fix, and it costs nothing. Housecall Pro’s **Sales Proposal Tool** is included in your Max plan. Their pricing page lists it as a “$40/mo value” and charges $40 a month for it on the Basic and Essentials plans; on Max it is bundled and you are already paying for it. It sends automated follow-up reminders on proposals that have had no response. That is the entire job the spreadsheet is doing badly (housecallpro.com/pricing and housecallpro.com/features/sales-proposal-tool/, both read 2026-09-01).

Setup is about two hours: turn the tool on, rebuild the open items from Elena's sheet inside it, and set a follow-up cadence. We would suggest day 2, day 7 and day 14, then a call from you.

What it will not do, so you are not surprised. Estimates do not push across to QuickBooks (help.housecallpro.com/en/articles/6293215, read 2026-09-01), so your accounts will still not show a forward view of quoted work. If you want that, it stays a manual report for now.

One boundary, in your words. You told us you do not want a system quoting a repipe automatically, and you do not want anything that sounds like it is not really you talking to a customer who has used you for ten years. Nothing here touches either. **The price stays yours.** What changes is that the reminder to follow up stops depending on you remembering.

Verdict: habit, sitting on a setting nobody switched on. The tool has been in your plan the whole time. The spreadsheet exists because the tool was never turned on, and the habit grew around the gap.

Finding 2: You check Housecall Pro against QuickBooks by eye

Worth $4,220 to $13,100 a year. Confidence: High.

What it is. Every week or two, you and Elena compare what Housecall Pro says happened against what QuickBooks recorded. On your own description this ranges from "an hour" to "the whole Saturday". At 60 jobs a week you are eyeballing something like 3,000 invoices a year.

What it costs you now.

```
Elena  1.0 to 2.5 hr/wk x $29/hr x 50 weeks = $1,450 to $ 3,625
you    1.5 to 5.0 hr/wk x $51/hr x 50 weeks = $3,825 to $12,750
                                     total  = $5,275 to $16,375/yr
recoverable at 80%                          = $4,220 to $13,100/yr
```

Why only 80%, and this one is not a hedge. Some of this checking can never go away, because of what the connection between the two systems actually is. Housecall Pro's own documentation says the sync is **one way**, from Housecall Pro into QuickBooks, and that it carries exactly four things: invoices, payments including those on Recurring Service Plans, new customer records, and new Price Book items. It also says, in as many words, that **"Estimates do not push over to QuickBooks Online"**, that invoices you delete in one system must be deleted by hand in the other, that changes to a job do not push unless you use an action button, and that manual edits to Price Book items do not sync at all (help.housecallpro.com/en/articles/6293215, read 2026-09-01).

So estimates, deletions and job edits will always need a human. That is the 20% we did not count.

The fix. Two hours, free, and in three parts. First, switch the sync trigger to fire when a job is marked finished rather than leaving it to a manual push, so the gap closes at source. Second, agree a short written list of the four object types above and stop checking anything outside it, because those are the only things the connection ever promised to carry. Third, replace the by-eye comparison with one monthly report run against those four types. Most of what you are checking today is work the connection was never doing in the first place.

Verdict: mostly a setting, with a real limit underneath it. The bulk of it is configuration and scope you can fix this week. The residue is a genuine product limit and no amount of setup removes it.

Finding 3: After-hours callers reach voicemail, and some hire somebody else by morning

Worth $8,438 to $16,031 a year. Confidence: Medium.

What it is. You called this the task everyone hates most: “nobody likes starting the day apologizing to five people for not picking up the phone the night before, and by then a couple of them have already called somebody else.” Elena pulled two weeks of the call log for us and it turns out you were describing it accurately.

What it costs you now.

```
week of Aug 10: 14 after-hours calls, 9 voicemails, 5 hangups
week of Aug 17: 11 after-hours calls, 7 voicemails, 4 hangups
of the voicemails, 3 of 9 and then 2 of 7 had already hired somebody by the callback

confirmed lost: (3 + 2) / 2 weeks = 2.5 callers/wk x 50 = 125 a year
at 30% recaptured: 37.5 jobs x $450 = $16,875 of work x 50% margin = $8,438/yr
upper end, counting half the hangups as lost too:
  4.75/wk x 50 = 237.5 x 30% = 71.25 jobs x $450 = $32,063 x 50% = $16,031/yr
```

We show the value of the work and the margin on it, because $450 of recovered revenue is not $450 of value to you. The margin is what you keep. We used your two weeks of log rather than the 30 calls a day from your intake form, because that figure is your total call volume and not the after-hours part of it.

Now the part that matters more than the arithmetic. You already looked at this. You told us Elena researched an AI phone answering service last year, watched a demo, and you never switched it on, because it “felt like it was built for a call center, not for a plumber who might be under a sink”, and because you were not confident it would book the job correctly or know a real emergency from a routine call. That is a good objection and most of the market deserves it. So here is what we checked, by name, and what we found. Everything below was read on 2026-09-01.

Option	Does it meet your objection?	Price
Sameday AI	**Yes.** Built for home services, and it applies your emergency criteria rather than its own.	**$449/mo** Launch, **$789/mo** Scale, both published.
Avoca AI	**Partly.** It answers, triages and books into Housecall Pro, but it is aimed at offices larger than yours.	**Not published.**
Housecall Pro CSR AI	**Could not establish.** Its page documents booking and escalation rules, not a way to define what counts as an emergency.	**Not published.**

Option	Does it meet your objection?	Price
Ruby	**No.** A receptionist service, not trades triage that books into your job board.	Not applicable
Answering Legal	**No.** It is for law firms.	Not applicable
Rilla	**No.** It analyzes and coaches sales conversations. It does not answer your phone.	Not applicable

The detail behind the first three verdicts, since the table only has room for the answer. Sameday AI's plumbing page says it "qualifies burst pipes, active leaks, and no-water calls, applies your emergency criteria, and transfers true emergencies to your on-call plumber while scheduling everything else automatically". **Your criteria, not theirs**, which is the exact thing you said was missing. Avoca AI's published positioning aims at operators above $3M in revenue with five or more office staff taking 50+ calls a week; you have Elena. They also have no pricing page, and we will not repeat the figures other websites quote for them, because those are not Avoca's numbers. Housecall Pro's CSR AI page talks about setting "clear booking and escalations rules", which sounds right, but it does not document letting you define what counts as an emergency, and that is your whole question; other write-ups describe it spotting words like "emergency" and "urgent", which is not the same as applying your rules.

Two things we are telling you not to waste an afternoon on: Answering Legal and Rilla are both category errors that show up in searches for this problem. Neither one answers a plumbing call.

A cap you should ask about before you sign anything. Sameday's $449 tier includes **500 voice minutes a month** and their pricing page does not publish what a minute costs after that. Your after-hours volume is small, roughly 12 calls a week, so 500 minutes is probably comfortable for after-hours only. It is almost certainly not enough if you ever point the whole 30-calls-a-day at it. **Get the overage rate in writing before you sign.** We have not modeled an overage, because we cannot source one.

The budget tension, said plainly rather than smoothed over. You told us you are comfortable spending $250 to $500 a month on new tools. At $449, Sameday fits inside that. But you are already spending $482.50 a month on software, so saying yes takes you to about $931 a month, which is close to double. That is a real decision and it is yours. Three honest options:

1. **Do nothing.** This is a legitimate answer and we are not going to pretend otherwise. The finding is Medium confidence, it rests on two weeks of log, and $449 a month is a lot next to a $8,438 estimate. If you do nothing here, the other five findings still return about $16,733 a year at the low end, and every one of them is free.
2. **Measure first, then decide.** Spend nothing. Elena can keep a tally for four more weeks of after-hours calls and how many had already hired someone by the morning. If 2.5 a week holds up, the case is much stronger than two weeks can make it. This is what we would do.
3. **Buy it, but start narrow.** After hours and weekends only, not daytime overflow. Get the overage rate first. Write your emergency rules down before the demo: burst pipe, active leak and no water go to the on-call phone; everything else books for the morning. Then judge the demo against your own list rather than against theirs.

Section 6 puts this decision in week 4 on purpose, after the free fixes have started returning roughly what it costs.

Verdict: neither a setting nor a habit. This one needs something you do not currently own, which is precisely why it is third on the list and not first.

Finding 4: Payroll gets redone by hand, and not for the reason you think

Worth $203 to $813 a year. Confidence: Medium.

What it is. You pay for the QuickBooks Payroll add-on. It is supposed to take the hours from Housecall Pro timesheets. It does not, often enough that Dana works off a printed report instead. Your bookkeeper's count: over the last four months, 8 runs, clean on 3, done by hand on 5. You told us it seemed to get worse after a Housecall Pro update in the summer.

What it costs you now.

```
biweekly runs                               = 26 a year
manual on 5 of 8                            = 62.5%, so about 16.25 runs a year
16.25 x 0.5 to 2.0 hr x $50/hr (Dana)       = $406 to $1,625/yr
recoverable at 50%                          = $203 to $813/yr
```

This is the smallest number in the report and possibly the most useful sentence in it. We went looking for the broken integration so we could tell you how to fix it. We could not find it, because as far as we can establish **it does not exist and never has.**

Housecall Pro's Time Tracking feeds **Housecall Pro's own payroll product**, at its Advanced tiers (housecallpro.com/features/payroll/ and help.housecallpro.com/en/articles/8594391). Separately, Housecall Pro's QuickBooks integration carries invoices, payments, new customers and new Price Book items, and nothing else (help.housecallpro.com/en/articles/6293215). Timesheets are not on that list. We read six of their own surfaces and none of them documents hours crossing from Housecall Pro into Intuit's payroll product on any plan, at any price. All three read 2026-09-01.

We want to be precise about how strong that claim is. We did not find a vendor statement saying "this is not supported". We found consistent absence across every surface where it would be documented if it existed. That is weaker than a denial and much stronger than a guess, and you should weigh it that way.

If your Housecall Pro rep tells you otherwise, ask them for the help article, and tell us, because we would want to correct this.

So nothing broke in the summer. What most likely happened is that a change made a manual workaround stop working, and it had always been manual underneath.

Our recommendation is to keep doing it by hand. That is a real recommendation and not a shrug. The problem is worth about $400 a year at the midpoint. Every route to automating it costs more than that in money or in risk:

- **Move to Housecall Pro Payroll** (their Advanced tiers). The timesheet link is genuine, but you would be moving payroll systems to save a few hundred dollars, and your accounts would then span two vendors differently than they do now.
- **Move to Gusto**, which has well-documented time tracking and payroll together. Same objection: the switching cost dwarfs the problem.
- **Keep re-keying, and stop waiting.** Dana already has a working method. The only thing you gain from this finding is the end of the expectation that it will start working by itself, and the ten minutes a fortnight you spend investigating it.

Verdict: a limit. Not your fault, not a setting, and not something a support ticket will fix.

Finding 5: Comfort Club members lapse with nothing chasing them

Worth $697 a year that we can count. Confidence: Medium.

What it is. You have 145 Comfort Club members at $199 a year. Over the last twelve months 38 joined and 24 lapsed. Nothing automatic asks a lapsing member to renew.

What it costs you now.

```
24 lapsed x $199                     = $4,776/yr of recurring revenue walking out
at 30% recaptured                    = 7.2 memberships, which we round DOWN to 7
7 x $199 = $1,393 of work x 50% margin = $697/yr
```

What we deliberately did not count, and it is the bigger number. You estimated that about one in three membership visits turns up $300 to $350 of extra paid work. At 145 members that would be a five-figure line in this report. You told us plainly that it was a guess with no system behind it, and Elena offered to pull real figures if it mattered. **We left it at zero.** A five-figure finding resting on an estimate is how audits get written that fall apart the first time somebody checks them.

If you want it counted, that is exactly what your two-week question window is for. What we would need is twelve months of membership visits and which of them produced a second invoice. Elena can pull it, and we will recompute at no charge.

The fix, and it costs nothing. Recurring Service Plans is a Max-plan feature and you are on Max (housecallpro.com/pricing, read 2026-09-01). It holds memberships, bills them, and schedules the visits. Your members are currently in a spreadsheet. Moving 145 records across is about three hours of Elena's time, most of it a one-off import, and after that the renewal chase happens without anybody remembering to do it.

Verdict: a setting you are already paying for and have not switched on.

Finding 6: Material cost never lands against the job

Worth $0 in this report, on purpose. Confidence: Medium.

What it is. You order from the supply house and, in your words, you “still eyeball job profitability instead of tracking it properly per job in the system”. So you do not know which jobs make money. You suspect some do not.

Why the number is zero. To size this we would need the per-job material cost, and that is exactly the figure you do not have. We could construct something from your $450 average and a typical material share, but it would be our assumption multiplied by your average, presented as your finding. That is padding, and we would rather hand you a zero we can defend. **What this finding is worth is the decisions it changes once you can see it, and that is real even though we are not putting a dollar on it.**

This is where the report saves you money by telling you not to buy something.

Here is the trap. The obvious move is to upgrade QuickBooks so it can do job costing. You have QuickBooks Online Essentials, and it cannot: Projects is a Plus and Advanced feature. Plus is $140 a month against Essentials at $85, so the upgrade is **$55 a month, $660 a year** (Intuit plan pages, read 2026-09-01).

Do not spend it, for two separate reasons.

1. **It would not work anyway.** The Housecall Pro connection carries invoices, payments, customers and Price Book items. It does not carry cost data at all (help.housecallpro.com/en/articles/6293215, read 2026-09-01). You would be buying a job costing feature and then hand-feeding it, which is the problem you already have.
2. **You already own the answer.** Housecall Pro has **Job Costing** built in, available from the Basic plan upward, so it is in your Max plan today. It tracks labor, materials, commissions and miscellaneous expense against the job, and it pulls unit cost straight from your Price Book automatically (help.housecallpro.com/en/articles/6536636, updated 2026-07-22, read 2026-09-01, and housecallpro.com/features/job-costing/).

The fix. The work is not switching it on, it is putting real unit costs into your Price Book, and that is a genuine job: perhaps four to six hours with your supply house invoices open. Do the twenty items you fit most often and leave the tail. After a quarter of jobs running through it you will have the real number, and this finding stops being a zero.

Verdict: a limit in one product and a setting in the other. QuickBooks Online Essentials genuinely cannot do it. Housecall Pro genuinely can, and nobody switched it on.

4. What we deliberately did not pursue

Everything we looked at and left, with the reason, so you can see it was decided rather than missed.

- **Moving off Housecall Pro.** Nothing in your intake asks for it, four of the six findings above are fixed by features it already has, and a migration would cost more than every finding in this report combined.
- **Moving off QuickBooks Online.** Same reasoning. Your $67.50 rate is below current list, so a move would cost you money on day one.
- **The QuickBooks Online Plus upgrade for job costing.** Ruled out inside finding 6, at $660 a year, because Housecall Pro already does it and the connection would not carry the cost data anyway.
- **Automating the price on a repipe or a big repair.** Your standing rule, stated in your intake, and we agree with it. We looked only at how fast a price reaches the customer, never at who decides it.
- **Anything that sounds like it is not really you** texting or calling a ten-year customer. Your words, and they bind the fixes in findings 1 and 3.
- **The truck stock and on-call rota spreadsheet.** You told us you do not trust the app’s inventory tracking. The sheet works, the payback is small next to findings 1 to 4, and we are not going to spend your first free hours on it.
- **The Facebook page you barely post to.** No finding here would clear the bar we hold ourselves to.
- **Google Local Services Ads and your Google Business Profile.** Both are working and neither showed up in your answers as a stall or a time sink. Bonus A covers the part of this worth your attention.
- **Anything above $500 a month.** Your stated ceiling for new tools, and it ruled out several otherwise reasonable options before we ever wrote them down.
- **The time it takes to quote a big job** (row 4 of the Section 2 inventory). Your intake describes it but does not time it, and we did not ask. It may be a finding. We are not going to invent it into one.

One of your named pains has no finding, and you should know which. You listed reviewing invoicing and the books on Fridays and Saturdays as the third thing eating your week. That is finding 2 and it is counted there. The rest of that time is inherent work: somebody has to look at the books.

5. What this is worth, and the bar we hold ourselves to

```
                                    low            high
1. Big quotes go quiet           $11,613        $23,225
2. Housecall Pro vs QuickBooks   $ 4,220        $13,100
3. After-hours callers           $ 8,438        $16,031
4. Payroll by hand               $   203        $   813
5. Comfort Club lapses           $   697        $   697
6. Material cost per job         $     0        $     0
                                 -------        -------
total identified                 $25,171        $53,866
new tool spend (Sameday AI)      -$5,388        -$5,388
saving found (annual billing)      +$360          +$360
                                 -------        -------
net                              $20,143        $48,838
```

- **Total identified opportunity:** between **3.3 and 8.7 hours a week** and **$25,171 a year**.
- **New tool spend:** $5,388 a year, all of it finding 3, and only if you decide to take it.
- **Saving found:** $360 a year, finding 2's annual-billing switch, which costs you nothing.
- **Net: $20,143 a year.**
- **Even counting only what we're certain of: $6,840/yr.** That is findings 1 and 2, the two rated High, counting only labor we can remove and no revenue we hope to win back.

The bar we hold ourselves to. We do not send an audit that finds less than $4,500 a year against a $1,500 fee. This one finds $25,171. That is our own standard for our own work, and it is the reason this report exists in the shape it does rather than a promise we are making to you.

Where we have been deliberately conservative, so you can see the shape of the caution rather than take our word for it:

- Every headline figure above is the **low end** of its range.
- Finding 1's recapture is modeled at **5%** when the rules we work to would allow 30%. At 30% that line alone would read $53,955 instead of $8,993.
- Finding 6 is **$0**, and your one-in-three follow-on estimate in finding 5 is **excluded entirely**.
- Finding 5 rounds 7.2 memberships **down** to 7.
- The hourly rates are **burdened, not fully loaded**: they include wages and the employer's benefit cost, and exclude trucks, tools, insurance, rent and software. That understates every hours-based finding here.
- Your own hourly rate is used at **$51** rather than the **$65** you estimated, because the sourced market figure came in lower and we take the lower of the two.

6. The first 30 days, in order

Free and fast first. The paid decision comes last, after the free work has started paying for it.

Week	Do	Why this week	Who	Time and cost	Return
1	Switch Housecall Pro Max to annual billing	Same plan, $30/mo cheaper, one screen	You	10 min, $0	**$360/yr**
1	Turn on the Sales Proposal Tool and load the open quotes from Elena's sheet into it, on a cadence you approve	It is already in your plan. This is the biggest finding and the cheapest fix	Elena	2 hrs, $0	**$2,620 to $5,240/yr labor, plus $8,993 recaptured**
2	Set the QuickBooks sync trigger to fire on job completion, and write down the four things the sync actually carries	Stops you checking for things it never carried	Elena	2 hrs, $0	**$4,220 to $13,100/yr**
2	Move the 145 Comfort Club members into Recurring Service Plans	Max feature you already pay for; renewals stop depending on memory	Elena	3 hrs, $0	**$697/yr**
3	Put real unit costs on your twenty most-used Price Book items from the supply house invoices, switch on Job Costing	Makes finding 6 countable next quarter. Do not buy the QuickBooks upgrade	You	4 to 6 hrs, $0	unlocks finding 6
3	Dana stops investigating the payroll sync and keeps re-keying. One conversation	The integration does not exist. Ends the waiting	You	15 min, $0	**$203 to $813/yr**
3	Elena starts a four-week after-hours tally: calls, voicemails, how many already hired somebody	Turns finding 3 from two weeks of evidence into six	Elena	5 min a day, $0	de-risks the week 4 decision
4	Decide on after-hours answering. Write your emergency rules first, get the overage rate in writing, then judge the demo against your list	Last, on purpose. By now the free fixes are returning roughly what this costs	You	2 hrs, then $0 to $449/mo	**$8,438 to $16,031/yr**

Total cost of weeks 1 to 3: $0. Total return from weeks 1 to 3: about $16,733 a year at the low end, plus the $360 saving. Week 4's decision costs $5,388 a year and returns $8,438 at the low end.

If you only do three things: switch to annual billing (ten minutes, $360). Turn on the **Sales Proposal Tool** (two hours, the largest finding in the report). Set the sync trigger and stop checking what the connection never carried (two hours, the highest-confidence finding).

Who decides what. Every "you" above is you, not a vendor. The only step that needs anybody outside your business is week 4, and it points at the priced shortlist in finding 3, not an open search.

7. Appendix: our assumptions

Every judgment call sitting on top of the numbers, so that disagreeing with one rescales the rest instead of discrediting the report.

The three hourly rates, and both figures for each

Per your instruction we show what you told us alongside what we sourced, and we use the lower.

Role	You said	We sourced	Used
You	$65/hr	**$50.92/hr**	**$51**
Elena	$28 to $30/hr	$31.01 to $36.78/hr	**$29**
Dana	$50/hr	$50.04/hr equivalent	**$50**

Why each of those three is what it is. Your **$51** is the Texas 75th percentile for plumbers, pipefitters and steamfitters (SOC 47-2152), $35.63/hr, times the employer benefit load below. It is lower than your own estimate, so we used ours. Elena's **$29** is your own figure: Texas secretaries and administrative assistants (SOC 43-6014) run $31.01 to $36.78/hr burdened, median to 75th percentile, and yours is lower, so we used yours. Dana's **$50** is her contracted rate, which is a real invoice and not an estimate; a contractor's billed rate already includes their costs, so no load is added, and the cross-check is Texas bookkeeping clerks (SOC 43-3031) at the 90th percentile, burdened.

Wage source: US Bureau of Labor Statistics, Occupational Employment and Wage Statistics, 2025 reference period, Texas statewide. Read 2026-09-01 through O*NET OnLine's state wage tables, which republish the OEWS state file; bls.gov itself refused our requests that day.

Benefit load: US Bureau of Labor Statistics, Employer Costs for Employee Compensation, March 2026, released 2026-06-12. Private industry total compensation $46.60 per hour worked against wages and salaries of $32.60, which is a multiplier of **1.429**.

Three honest limits on those rates. First, they are **burdened, not fully loaded**: wages plus the employer's benefit cost, with no truck, tool, insurance, rent or software overhead, because no free and checkable overhead benchmark for residential plumbing was available to us. That understates every hours-based finding. Second, the wage survey **excludes the self-employed by definition**, and you are an owner-operator, so your rate is drawn from employed master plumbers as the closest defensible proxy. Third, we wanted the benefit load for small goods-producing employers specifically, which would be lower than the all-industry figure we used; that table was unreachable on the day, so we used the higher published figure and then took your wage base at the 75th percentile rather than higher up the band, to avoid banking an increase we could not source.

Volume and working-week assumptions

- **A 50-week year** throughout, which allows two weeks off. If you work 52, every annual figure here is about 4% low.
- **Given by you:** 60 jobs a week, 30 calls a day, 45 open quotes a month, $450 average job, 145 members, the two weeks of call log, the July and August quote figures, the payroll counts, the tool invoices, the membership joins and lapses.
- **Estimated by us:** the hours-per-week ranges in findings 1 and 2. They come from your own descriptions, including “some weeks that’s an hour, some weeks it eats the whole Saturday”, and they are ranges rather than points because that is genuinely how well we know them.
- **Gross margin: 50%**, used wherever we convert recovered work into value. Published benchmarks for residential plumbing service and repair run 50% to 65%; whole-trade figures that include new construction run lower. Publishers disagree mainly on whether the truck is a cost of the job or an overhead, which is worth ten points or more by itself. We took the floor of the service and repair range.

How much of each finding we counted

We cap what we claim according to how confident we are, and we never claim the whole of anything.

Finding	Confidence	What we allowed ourselves	What we used
1, labor	High	up to 80% of the hours	80%
1, recaptured work	Medium	up to 30% of unanswered quotes	**5%**
2	High	up to 80% of the hours	80%
3	Medium	up to 30% of lost callers	30%
4	Medium	up to 50% of the hours	50%
5	Medium	up to 30% of lapsed members	30%, rounded down
6	Medium	Not applicable	$0

Methodology

We read your intake, drafted a findings list, had it reviewed before any prose was written, then asked you six questions to fill the gaps that mattered most. Every capability claim in Section 3 was checked against the vendor’s own current documentation and carries the date we read it, because prices and features move monthly. Where a vendor does not publish a price we say so rather than repeating a third party’s estimate: that applies to Housecall Pro’s CSR AI add-on, its `Pipeline` add-on, and Avoca AI.

Where a claim rests on absence rather than a statement, we say that too. Finding 4 is the case: we established that no Housecall Pro to QuickBooks payroll timesheet route is documented on any of the six vendor surfaces where it would appear, which is not the same as the vendor saying it is unsupported.

We had no access to your systems. Every figure attributed to you in this report is a figure you or Elena sent us. We did not log into Housecall Pro or QuickBooks, and nothing here was verified against a live account.

Delivery timeline

Day	What happened
0	Intake received and parsed
1	Findings list drafted and reviewed before any prose was written
2	Six questions sent to you; Elena pulled the call log, the quote sheet and the invoices
3 to 4	Outside research: wage data, margin benchmarks, and every vendor capability claim
5	Numbers worksheet, every figure with its arithmetic
6	This report drafted
7	Checks run, report rendered and delivered

Data handling

This is a fictional sample, so there is no customer data to hold or delete. On a real order we work from what you send us plus any read-only access you grant, we delete shared documents and revoke access within 30 days of delivery, and we keep the report and the numbers worksheet as work product under the agreement.

How to get help

Two weeks of email questions, starting the day this arrives. A check-in from us on day 10. A live 30-minute readout call, included with your audit, booked through the link in your delivery email.

Bonus A: Getting named when a customer asks an AI assistant

More of your customers are starting a search by asking an assistant rather than typing into a search box. “Who is a good plumber near me for a burst pipe at 9pm” is a question people now ask a chat window, and the answer they get is assembled from what those systems can find and trust about local businesses.

Nobody can guarantee placement in an AI answer. Anyone who tells you they can is selling you something. The systems change their behavior without notice, they differ from each other, and the same question asked twice can produce different answers. What you can do is make the fundamentals findable and correct, which is the same work that makes you findable to a human, and then re-check it from time to time. That is the whole of the honest version of this.

What we would normally report here, and why this section is short. For a real customer we run a checklist against the business’s own public footprint. **Cobble Creek Plumbing and Drain does not exist**, so there is nothing to check and no assistant could name it. Rather than invent a result, this section gives you the checklist itself, which is the part that transfers.

The input checks, and what each one is for.

Check	What it means	Why it matters
robots.txt	Whether your website tells assistant crawlers they may read it	If the crawler is blocked, nothing else here can help
Structured data	Machine-readable business, address and services on your site	It is how a machine knows you are a plumber in your town rather than a page of words
Answer-first pages	A page that answers a question in its first two sentences	Assistants quote passages, not whole pages
Name, address, phone consistency	The same details everywhere they appear	Conflicting addresses across directories make you an unreliable source to quote
Google Business Profile	Complete, current, with services and hours	Still the strongest local signal there is
Bing Places	The same, on the other index	Several assistants lean on it, and most trades have never claimed it
Reviews beyond Google	Presence on more than one review surface	Breadth reads as corroboration
Freshness	Something on the site changed this quarter	Stale sites get quoted less

Check	What it means	Why it matters
Emergency and after-hours wording	Whether your site says plainly that you answer at night	This one connects to finding 3: it is no good being recommended at 9pm if the page does not say you pick up

What to do about a gap, in the same three shapes as the rest of this report. Do it yourself, most of these are an afternoon each. Hire anyone, a local web person can do the structured data and the directory work for a few hundred dollars. Or we can do it as a fixed-price piece of work. None of it routes only through us.

This section is descriptive and it is not in any total in Section 5. There is no reliable published figure for what an assistant mention is worth, so we do not put a dollar on it and it does not enter the value bar. The engine list, the crawler names and the products in this space all change quickly, so treat this checklist as current at 2026-09-01 and worth re-reading in six months.

Bonus B: A starter AI policy

The most common worry owners raise about AI is not cost, it is what happens to their customers' data. This is a starting point you can adapt. **It is not legal advice, and it is worth twenty minutes of your lawyer's time before you put it in front of staff.**

1. Approved tools.

Tool	Approved for	Not approved for
ChatGPT or similar	Drafting bid descriptions, rewriting a text to a customer, summarizing your own notes	Anything containing a customer's address, phone number, card detail or account number
Housecall Pro built-in AI features	Whatever the product does inside your own account	Nothing extra; the data is already there
An AI answering service, if adopted	Taking calls and booking per your written rules	Quoting a price on a repipe or a big repair

2. What never goes into a general AI tool. Customer names paired with addresses. Phone numbers. Card or bank detail. Photographs of the inside of a customer's home that show identifying features. Employee personal data. Anything from a commercial contract you have signed.

3. Customer data. If a tool is not one you pay for and control, treat anything typed into it as public. Strip names and addresses before pasting job notes. "A two-story house with a leak under the kitchen sink" is fine; the same sentence with the address is not.

4. Acceptable uses. Drafting and rewriting text you then check. Summarizing a long document. Explaining an error message. Working out how to word something awkward to a customer. In every case a person reads it before it goes out.

5. Prohibited uses. Setting a price on a job. Sending anything to a customer that a person has not read first, which is your own standing rule. Making a hiring or discipline decision. Passing off AI output as if a person wrote it in a situation where that matters. Uploading a signed contract.

6. If something goes wrong. Report it to Marcus the same day, and write down what was entered and into which tool. If customer data was involved, note whose. Do not delete anything before it has been recorded.

7. Review. Read this again every six months, and whenever you adopt a new tool. The tools change faster than the policy does.