Main Street AI Stories

Clearing the Line

How a Plumbing Business Used AI to Get More Jobs Out the Door



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A fictional tale of a realistic use case. Ray Delgado, Delgado Plumbing, Marisol Treviño, Andre Wilkes, Luis Cantú, Tommy Reyes, Cody Hall, Mrs. Lindqvist and Gene Ostrowski are invented, and any resemblance to real people or businesses is coincidental. All dollar figures and counts are illustrative. Nothing here is legal, financial or licensing advice.

CHAPTER 1

The Whiteboard

At 6:50 on a Tuesday morning, Ray Delgado stood in front of the whiteboard in his office in New Braunfels and counted what was wrong with it.

Six columns, one for each truck. Five had names and addresses written in Marisol's neat block letters. The sixth said "RAY" at the top, and under it, in his own handwriting, were four addresses he was supposed to visit for estimates that day. Two of them had been on the board since Friday.

Delgado Plumbing had six trucks, five techs, one office manager, and an owner who had started the company fourteen years ago with a used van and a pipe threader. Most days it ran fine. The phones rang, the trucks rolled, the drains got cleared. But for months Ray had carried a feeling he couldn't name. The company was busy all the time and wasn't growing. Revenue had been flat for two years. Everyone was tired.

His phone buzzed. Andre, from a house on the river: "Water heater is shot. Customer wants a price on a tankless. Can you come by?"

Ray could not come by. He had four estimates and a 9 a.m. call with the supply house about a back order. He texted back "this afternoon maybe" and knew that meant tomorrow, and that tomorrow meant the customer would call someone else.

That night at the kitchen table, he opened a chat assistant on his laptop. He had used it to write a few job ads and once to settle an argument about grease trap rules. He typed the way he talked.

> I own a residential plumbing company. 6 trucks, 5 techs, me, and an office manager. We're busy every day but revenue has been flat for two years and everybody's worn out. I don't know if I need more techs, more marketing, or new software. Where do I even start?

He half expected a sales pitch for software. What came back was a question.

> Before picking a fix, it helps to find the one step your whole business waits on. A business can only move as fast as its slowest step. If calls come in faster than estimates go out, more marketing just makes the pile bigger. If estimates go out faster than you can install, more estimates just make customers wait. So the first job is to find that step. Do you have records we could look at? A call log, a list of open estimates, last month's schedule?

Ray read the first lines twice. *A business can only move as fast as its slowest step.* He had heard someone at a trade show call it the theory of constraints. He'd nodded and forgotten it. Put that way, it was just plumbing. Water moves as fast as the narrowest pipe lets it.

He had records. He had not looked at them together in years.

The next morning he asked Marisol for three things: the call log from the phone system for the last thirty days, the estimate list from their job software, and the printed schedules from the same month. Marisol Treviño had run the office for nine years. She gave him a look that said she had been waiting for someone to ask.

"Why?"

"I want to know what every job is waiting on."

"I can tell you that," she said. But she pulled the reports.

Before he pasted anything in, he did what his nephew, who did IT for a school district, had told him to do. He took out the names, phone numbers and street addresses, and replaced them with job numbers. The chat tool he used wasn't one the business had set up for customer data, and he didn't want Mrs. Somebody's gate code sitting in it. The rule was simple: if a tool hasn't been approved for customer information, customer information doesn't go in it. Job numbers, dates, types of work and dollar amounts were enough.

> Here are three lists from the last 30 days with customer info removed. 1) Call log: date, time, answered or missed, call length. 2) Estimates: job number, date requested, date sent, amount, status (open, won, lost). 3) Schedule: each truck, each day, jobs and type. Sort these and tell me where work is waiting.

The answer took a minute.

> Here's what stands out. Calls: 612 calls, 131 missed (21%). Most missed calls are between 11:30 and 1:30 and after 5 p.m. Estimates: 74 requested. Average 5.8 days from request to sent. 31 still open. Schedule: techs averaged 4.1 jobs a day. Mostly service calls and drain work. My first hypothesis is that missed calls may be your biggest limit. One in five callers isn't reaching a person, and many of those are likely new jobs. This is a hypothesis, not a conclusion. Can you confirm whether missed calls are mostly new customers?

Ray liked that it called it a hypothesis. He did not like the hypothesis. It sounded like every answering service ad he'd ever deleted.

He printed it and laid it on Marisol's desk the next morning.

She read it, then pulled up the phone system. “Half of those lunch misses are the same people calling twice because I’m on the other line. They get me on the second try. And after five, it’s mostly existing customers asking when we’re coming. I call every one of them back by 8:15 the next morning.” She tapped the page. “We don’t lose many jobs on the phone, Ray. We lose them here.” Her finger was on the estimates. “Five point eight days. You know what a homeowner with a dead water heater does in five point eight days?”

He knew. He had done it himself, as a customer, with a dead air conditioner. You call the next company.

That night he typed it all in.

> My office manager says the missed calls are mostly repeat callers who get through on the second try, and after-hours calls are existing customers she calls back by 8:15. She thinks the estimates are the problem. Most estimates for water heaters, repipes and sewer lines go through me. Does the data support that?

> That correction matters, and it changes the picture. If missed calls are mostly duplicates and callbacks, the phone is not where work is getting stuck. Looking again at the estimates: of the 74 requested, 52 were for jobs over $1,500, and all 52 were assigned to you. Those 52 averaged 7.2 days to send. The 22 smaller ones that techs priced on site averaged same day. Of the 31 still open, 26 are yours. Won estimates were sent in an average of 3.1 days. Lost estimates averaged 8.4 days. A revised hypothesis: the estimate step for larger jobs, which runs through one person, may be what limits your completed work. Before treating that as settled, it would help to track a week of new requests: when each came in, when you saw the house, when the price went out. Is that typical, or was last month unusual?

Ray sat back. Twenty-six of thirty-one open estimates were his. The lost jobs had waited almost three times as long as the won ones.

He thought about the whiteboard. Five columns full of service calls, and one column, his, full of the jobs that actually paid the bills. Water heaters at $2,200 to $4,800. Repipes at $9,000 to $14,000. Sewer line replacements that could run past $12,000. Every one of them waited on him. And he spent his days driving to supply houses, covering sick days, and answering every tech's question in person.

He was the narrow pipe.

He didn't like it, but he had seen enough plumbing to know you don't argue with where the water backs up. He agreed to track one week, the way the AI suggested, on a sheet of paper taped to the whiteboard.

The week confirmed it. Eleven new big-job requests. Ray saw four houses in the first three days. Two prices went out. Andre's tankless customer went with a competitor on Thursday.

So the question was no longer what was wrong. It was what to do about a bottleneck that had his name on it.

CHAPTER 2

Behind the Symptom

The first answer Ray reached for was the one every owner reaches for. Hire somebody.

It was Saturday morning. He'd brought his laptop to the office because the house was too loud, and he sat at Marisol's desk with a coffee from the gas station on Walnut.

> OK. The data and my office manager agree. Big-job estimates wait on me, and slow estimates lose jobs. I'm thinking I hire an estimator or buy estimating software. Which one?

The reply was confident, organized, and wrong.

> Both are reasonable options. A dedicated estimator typically costs $55,000 to $75,000 a year plus a vehicle. Estimating software for plumbing ranges from $150 to $400 a month and can generate good, better, best options from a price book. Given your volume, a combination may make sense: software now, an estimator once volume grows. Here's a comparison table…

Ray read the table and felt the same tired feeling he got from software demos. He'd been here before. Two years ago he'd paid for a dispatch program that did twenty things and he used three.

He typed back with some heat.

> Hold on. You told me last week not to jump to a fix before understanding the step. Now you're selling me software. I don't even know yet WHY estimates take me 7 days. I don't think it's the paperwork. Pricing a water heater takes me 10 minutes once I'm standing in front of it. It's getting there.

> You're right, and I skipped a step. Before adding capacity with a hire or a purchase, the usual order is: first get more out of the step you already have, then make sure nothing else is starving or interrupting it, and only then spend money to add capacity. Let's look at how your estimate time is actually used. Can you walk me through what happens between a request and a sent price, and where your day goes?

That was better. It was also harder, because it meant writing down his own day honestly.

He did it on Monday, with a notepad in the truck. Every time he switched tasks, he wrote the time and what he was doing. By 5 p.m. it looked like this:

- 7:00 to 7:40. Office. Techs asking about parts and jobs.
- 7:40 to 8:30. Drove to the supply house for a pressure reducing valve Luis needed.
- 8:30 to 9:15. Supply house call about the back ordered water heaters.
- 9:15 to 10:30. Covered a drain call because Cody was out sick.
- 10:30 to 11:20. Estimate. Gas water heater, attic install.
- 11:20 to 12:40. Drove across town to look at a slab leak Tommy found. Talked to the homeowner.
- 12:40 to 2:00. Lunch in the truck. Returned six calls.
- 2:00 to 2:50. Estimate. Repipe, 1970s ranch, polybutylene.

- 2:50 to 4:30. Andre's job. Customer wanted the owner.
- 4:30 to 5:10. Office. Signed checks.

Two estimates in a ten hour day. About an hour and forty minutes of the thing only he could do.

He typed it in.

> Your log shows about 100 minutes of estimating in a 10 hour day. The rest went to work that other people could do or that could be planned differently: parts runs, covering a service call, answering questions in person, visiting a job where a customer asked for the owner. That's common. The busiest person in a business is often the bottleneck partly because everyone routes their problems to them. The pattern behind the symptom looks like policy, not effort. A few questions: 1. Who decides which jobs need an owner estimate? Is there a written rule, or is it "anything big goes to Ray"? 2. When a tech finds a big job, what do they collect before calling you? 3. Is there a set time in your day that's protected for estimates?

Ray answered honestly. No written rule. Anything over about $1,500 went to him, mostly because years ago a new tech had underpriced a repipe by $3,000. The techs collected nothing in particular. They called him and said "you need to see this." And no, no protected time. Estimates fit in around everything else.

That evening he called Gene Ostrowski, who'd run an electrical contractor in Seguin for thirty years and sold it the year before. Gene had been his first commercial customer, back when Ray still answered his own phone.

Gene listened to the whole thing. "So the rule that protects you from a bad price is the same rule that's choking you."

"Yeah."

"You don't need to throw out the rule. You need to stop being the only one who can carry it."

Ray brought that back to the laptop.

> A friend who ran an electrical company said the rule that protects me from bad pricing is the same rule choking me. I don't want techs pricing repipes on their own. But a lot of what goes to me is water heaters, and those are pretty standard. Help me sort out what actually needs me.

> That's a useful split. Let's sort your last 52 big estimates by type and by how much judgment each needed.

They went through it together over two evenings. Ray did the sorting. The AI kept the tally and asked questions when something didn't fit.

- Water heater replacements, like for like: 24. Same size, same fuel, same location. Price came straight from his price sheet plus a few standard adders.
- Water heater upgrades or relocations, including tankless: 9. Needed a look at gas line size, venting and space.
- Repipes: 8. Always needed him.
- Sewer and slab work: 7. Always needed him, usually with a camera.
- Other: 4.

Almost half the work waiting on him was the most predictable job they did.

> Here's a draft of the fix, framed around your bottleneck. **Get more from it:** Protect two estimate blocks a day, 10 to 12 and 2 to 4, for repipes, sewer, slab and complex water heater jobs. Group visits by area of town. **Stop starving or interrupting it:** Like for like water heaters get priced by the tech on site from an approved price sheet. Techs collect a standard set of

> photos and facts before any big job comes to you, so you can often price from the office. Parts runs go to whoever is closest or to the supply house's delivery. Cody's sick days get covered from the schedule, not by you. **Then, only if needed, add capacity:** If you're still behind after a month, revisit software or a hire with real numbers. Want me to turn this into a short written scope?

Ray did. He also asked it to make the scope something he could hand to Marisol and the techs without a meeting that ran an hour.

> **What it does:** Takes like for like water heater pricing off Ray. Gets Ray the facts he needs to price the rest without always driving out. Protects Ray's estimate time. Flags any estimate that hasn't been sent within 2 business days or followed up within 3. **Who uses it:** Techs (site checklist, price sheet for water heaters). Marisol (protects the estimate blocks, runs the follow-up list). Ray (prices everything else, approves any exception). **What stays with a person:** Any price off the sheet. Anything with gas line changes, venting changes, code questions or an unusual site. Ray decides those. **How we'll know it works:** Days from request to sent estimate. Number of open estimates over 3 days old. Win rate on big jobs. Ray's hours on estimating per week. **Trial:** 4 weeks, starting Monday.

It was one page. Ray could read it in a minute and a half. More importantly, he could see every part of it on a normal Tuesday.

He showed it to Marisol before he showed it to anybody else. She read it twice.

"Who tells the techs they can't call you for parts anymore?"

"Me," Ray said.

"And who tells you that you can't take Andre's customer who wants the owner?"

He hadn't thought of that one.

"You," he said. "Put it in the scope."

She wrote it in by hand at the bottom: *Owner requests go to Marisol first. She decides if Ray is needed.* It was the most important line on the page, and the AI had not thought of it either.

Now they had to build it. And Ray had a feeling the techs would have opinions.

CHAPTER 3

The Smallest Fix

The techs had opinions.

It was 6:45 on a Monday, the trucks idling in the lot, and Ray stood by the whiteboard holding five copies of a one-page checklist. Luis Cantú, who had been with him eleven years, read it first.

"Twelve photos? For a water heater?"

"Eight," Ray said. "Twelve for a repipe."

"I'll be standing in their garage twenty minutes."

"Instead of me driving out tomorrow, and the customer calling somebody else."

Luis thought about it. "What if the attic's a hundred and thirty degrees?"

That was a fair point, and Ray didn't have an answer. So he wrote it down.

He had built the checklist on Sunday night with the AI. He did not want an app. He wanted something a tech would actually use in a hot attic with a flashlight in his teeth. A rule, a template, a checklist, and one small automation that Marisol would run. Nothing that needed training.

The first prompt had been simple.

> Draft a one page site checklist a plumbing tech fills out before a big job estimate goes to the owner. Water heaters and repipes. Must work on a phone. Short. Photos plus a few facts. I'll review it.

The first draft was two pages and had a section called "Customer Sentiment Assessment." Ray cut that line and about half the rest. What survived, after he edited it, was this:

Water heater (all): photo of the data plate; photo of the whole unit and surrounding space; photo of the venting where it leaves the unit; photo of the gas shutoff and line; photo of the drain pan and expansion tank, if any; photo of the path from the door to the unit; fuel type; tank size; location (garage, attic, closet, other).

Repipe (add): photo of the main shutoff; photo of exposed pipe in two places; pipe type if known; number of bathrooms; one story or two; slab or pier and beam.

Ask the customer: When do you need this done? Anything else going on with the plumbing?

Luis's attic point became a line at the top: *If it isn't safe to get a photo, skip it and say why. Don't stay in an attic over 120 degrees for a photo.*

The price sheet was the part Ray was nervous about. He had never let anyone else price a water heater. He asked the AI to help him build it from his last forty water heater jobs, using only job numbers, sizes, fuel types, locations and his prices.

> Here are my last 40 water heater jobs with customer info removed. Build a simple price sheet for like for like replacements: base price by size and fuel, plus adders. Flag anything that looks inconsistent.

> Draft price sheet below. Base prices by size and fuel, plus adders for attic location, new expansion tank, new drain pan, and haul away. I flagged three jobs where your price was well below the pattern. Two were attic installs priced like garage installs. One was a 50 gallon priced like a 40. You may want to check whether those were discounts or mistakes.

Two of them were mistakes. One was a church. He remembered the church.

The sheet fit on one side of a page. Ray added a box at the bottom in bold: **Anything not on this sheet, call Ray. Gas line changes, vent changes, a move to a new location, or anything that looks wrong: call Ray.** He showed it to Andre, who had priced more water heaters on the phone with Ray than anyone. Andre found one more problem. The sheet didn't account for the city of New Braunfels permit fee being different from the county's. Ray fixed it.

That afternoon Ray did the thing he'd been avoiding. He wrote the new rules on a sheet of paper and taped it to the whiteboard, next to the tracking sheet.

1. Like for like water heaters: tech prices on site from the sheet.
2. All other big jobs: checklist and photos to Ray before he drives out.
3. Ray's estimate blocks: 10 to 12 and 2 to 4. Marisol protects them.
4. Parts runs: closest tech or supply house delivery. Not Ray.
5. Owner requests go to Marisol first.

Then the automation. Gene had warned him not to build anything clever, and Ray didn't intend to. The job software could already export a list of open estimates with the date requested, date sent and status. That was all he needed.

> Each morning Marisol exports our open estimates list. I want a simple routine: she pastes it in, and you give back (1) estimates not sent within 2 business days of the request and (2) estimates sent more than 3 days ago with no follow-up. For each one in group 2, draft a short, friendly follow-up text she can send from our business line. Use job numbers only. She adds the name herself. She reviews every message before it goes out.

> Here's a format that works. For follow-ups, a short message like: "Hi, this is Marisol at Delgado Plumbing. Just checking in on the water heater estimate Ray sent on Tuesday. Happy to answer questions or get you on the schedule this week. If you've gone another direction, no problem, just let us know."

Marisol read it and changed two things. She took out "no problem," because she thought it sounded like they didn't care. And she added a line for repipes offering a second walkthrough, because customers spending $11,000 usually wanted one.

"It writes like a nice person," she said. "I write like me."

"That's why you read them," Ray said.

Every message went through her. She decided which customers got a text and which got a phone call. A retired couple who had asked lots of questions got a call. A landlord with four rentals got a text. The AI never sent anything. It made a list and drafted words, and a person decided.

The first week was rough. Tommy forgot the checklist twice and called Ray from a driveway. Cody priced a water heater in an attic and missed the attic adder, which cost them $275. Ray didn't yell. He asked why. Cody said the attic line was at the bottom of the sheet and he'd stopped reading after the base price. Ray moved the location adders up next to the base price and put "ATTIC?" in large letters.

Luis, who'd complained the loudest, sent the cleanest set of photos all week. Ray priced a repipe on a 1978 ranch from his desk at 10:20 on Wednesday without leaving the office. The price went to the customer at 10:45.

"That's the first time I've ever priced a repipe without crawling under a house," he told Gene on the phone.

"How'd it feel?"

"Like cheating."

"It's not cheating," Gene said. "It's using your eyes better."

On Friday, Marisol's follow-up list had nine estimates on it. Four customers replied by Monday. Two booked.

It felt better. Ray knew enough not to trust feelings. He'd been feeling busy for two years. The question was whether the numbers would say the same thing.

CHAPTER 4

The Numbers Move

Four weeks after the rules went up, Ray sat down on a Sunday afternoon with the same three reports he'd pulled the first time. Call log, estimate list, schedule. Same thirty day window, same customer details removed.

He had written down what he'd measure before he started, so he couldn't move the target later. Four numbers, from the scope.

> Here are the same three reports for the 4 weeks since we changed the estimate process, customer info removed. Compare to the first month. Use the four measures from our scope: days from request to sent estimate, open estimates over 3 days old, win rate on big jobs, and my estimating hours per week. Tell me what changed and what you're not sure about.

> Here's the comparison.
>
> | **Measure** | **Before** | **After 4 weeks** |
> |---|---|---|
> | Days from request to sent estimate (big jobs) | 7.2 | 1.9 |
> | Open estimates over 3 days old | 26 | 7 |
> | Win rate on big jobs | 38% | 51% |
> | Owner hours on estimating per week | about 9 | about 16 |

> Like for like water heaters priced by techs: 19, all same day. What I'm less sure of: 4 weeks is a short period, and the season may be affecting demand. Win rate could be partly due to faster response and partly due to the follow-up texts. I can't separate those with this data. Also, one tech priced a water heater below the sheet; you may want to check whether that was approved.

Ray checked. The below sheet price was Andre giving a $150 discount to a widow on a fixed income. Ray had approved it by phone and forgot to note it. He noted it.

He looked at the table for a long time. Nothing in it was dramatic. It wasn't a story about doubling revenue. It was about a homeowner with a cold shower getting a price the same day instead of next Tuesday. Big job revenue for the month was up about $18,000 over the month before. He didn't know how much of that was the season. He wrote "maybe" next to it.

What struck him was the fourth line. He was spending more time estimating, not less. Sixteen hours instead of nine. But he was working fewer total hours. He'd stopped driving to supply houses. He'd stopped covering drain calls. He'd stopped being the person every problem got routed to. The step everything waited on was finally getting its time.

Then they refined it.

Mrs. Lindqvist's job showed one problem. She had a 75 gallon gas water heater in a hall closet, a size Ray rarely saw. Tommy priced it from the sheet, because the sheet had a 75 gallon line. But the closet had no combustion air, which meant the new unit needed venting work that wasn't on the sheet. Ray caught it when he reviewed the day's priced jobs, a habit he'd added in week two. He called Mrs. Lindqvist before anyone showed up with a truck. She appreciated the call. The new price was $640 higher, and she took it.

> A tech priced a closet install from the sheet but it needed combustion air work. I caught it on review. How do I tighten the rule without making the sheet so long nobody reads it?

> One option: add a short "stop" question to the checklist before any price is given. For example: "Is the unit in a closet, attic or any location other than the garage? If yes, did you check for combustion air and venting clearance?" If the answer is no or unsure, the job goes to Ray. That keeps the sheet short and puts the check where the tech already looks.

Ray used it, but in his own words. The checklist got one new line in bold: **Closet or attic? Check air and venting. Not sure? Call Ray.**

The follow-up texts got refined too. Marisol noticed that texts sent at 7 a.m. got almost no replies and texts sent around 5:30 p.m. got the most, when people were home and standing in front of the problem. She moved her follow-up run to the afternoon.

The techs had their own adjustments. Luis wanted the photo checklist printed on a laminated card in each truck, because his phone kept going dark in attics. Cody asked for a place to mark "customer is getting other bids," because it changed how quickly Ray needed to move. Both went in.

None of it was software. The automation was still a list Marisol pasted in each morning and a set of drafts she edited. Ray asked himself whether it was worth building something fancier. He decided the question could wait until the simple version stopped working.

Then, in week six, something new showed up on the whiteboard.

Ray noticed it on a Thursday. His estimate blocks were clean. The follow-up list was short. But the install column, the jobs customers had said yes to, was getting long. Eleven approved water heater and repipe jobs were waiting to be scheduled. Three customers had called Marisol that week asking when.

He typed in the newest schedule.

> Estimates are moving now. But approved jobs are piling up waiting to be scheduled. 11 approved big jobs, some waiting 9 days. Look at the schedule and tell me what you see. Hypothesis only.

> Looking at the schedule: water heater and repipe installs are almost all assigned to two techs, Andre and Luis. The other three techs are doing service and drain work at about 4 jobs a day. Andre and Luis are booked out about 8 business days. A hypothesis: the constraint may have moved from estimating to install capacity, specifically the two techs who do big installs. Before treating that as settled, it's worth checking why big installs go only to those two. Is it licensing, skill, equipment, or habit?

Ray knew some of the answer. Andre and Luis were his two journeymen with the most experience on repipes. But Tommy had installed plenty of water heaters at his last job. And the truck that carried the water heater dolly was always Andre's.

He wasn't sure which part was a real limit and which part was just the way they'd always done it.

That was a question for Monday, with the techs, at the whiteboard. Not a question for a chat window at the kitchen table.

CHAPTER 5

The Next Thing

On Monday at 6:45, Ray put the install column on the whiteboard in red and asked the techs one question.

"Why do all the big installs go to Andre and Luis?"

The answers came fast and didn't agree. Tommy said nobody had ever asked him. Cody said he'd do water heaters but not repipes yet, and that was fair. Luis said repipes needed somebody who'd done fifty of them, and that was also fair. Andre said the real problem was the dolly. There was one water heater dolly and one truck with a lift gate, and both lived with him.

Marisol said the scheduling software defaulted to Andre for anything tagged "water heater," because somebody had set it up that way four years ago. That somebody was Ray.

So the bottleneck wasn't just two men. It was two men, one dolly, one truck and one setting nobody remembered making.

Ray thought about what he'd learned. Get more from the step first. Stop other work from starving it. Spend money last.

That night he typed:

> We think the new bottleneck is big installs. Here's what the team said: only 2 techs do repipes (fair, it takes experience). Water heaters could go to a third tech. There's 1 dolly and 1 lift gate truck. The scheduler defaults water heaters to one tech. Help me sort this into what's cheap and quick vs. what costs money.

> Here's a rough sort. **Cheap and quick:** Change the scheduler default so water heaters can go to any qualified tech. Move water heater installs to Tommy and keep Andre and Luis on repipes. Move drain and service calls off Andre and Luis on repipe days. **Small cost:** A second water heater dolly, roughly $300 to $600. **Bigger cost, only if still needed:** A second lift gate truck, or training a third tech on repipes over several months. Measure the same way: days from approval to install, approved jobs waiting, and install hours per week for Andre and Luis.

It wasn't a complicated answer. Ray noticed he didn't need it to be. He already knew the method now. The AI was helping him keep the list straight and the measures honest.

He changed the scheduler setting before he went to bed. It took four minutes. He ordered a second dolly from the supply house in the morning.

He thought about the first night at the kitchen table, when he'd typed "do I need more techs, more marketing, or new software?" The honest answer had turned out to be: none of those, not yet. He'd needed to find the one step every job was waiting on, and that step had been him. Fixing it hadn't taken a new system. It had taken a checklist, a price sheet, two protected hours twice a day, a list Marisol ran every morning, and a willingness to stop doing things he'd always done.

The AI had been useful. It had sorted three messy reports faster than he could have, kept a tally, drafted checklists and texts, and asked good questions. It had also been wrong twice in ways that mattered. Once about the phones, and once when it reached for software before anyone understood the problem. Both times, a person who knew the work set it straight. Marisol knew the phones. Ray knew his own day. Luis knew the attic. Andre knew the dolly.

Gene called on Friday to ask how it was going.

"The bottleneck moved," Ray said.

"That's how you know you fixed it," Gene said. "If it didn't move, you fixed the wrong thing."

"So I just do this forever?"

"Every few months. Find it, fix it small, measure it, find the next one. The day you stop is the day it finds you."

Ray didn't make any promises to himself about growth. He'd seen too many owners make big promises off one good month. What he had was smaller and more useful: a way to look at his own business, pick the next thing to work on, try something cheap, and know within a few weeks whether it worked.

On Monday morning he wiped the old tracking sheet off the whiteboard and taped up a new one. At the top, in his handwriting:

Approved to installed. Days.

Then he went out to the lot, where the second dolly was sitting in the back of Tommy's truck.

APPENDIX A

The Prompts Ray Used

These are short on purpose. Adjust them to your business. Remove names, phone numbers, addresses and anything else private before you paste records into a tool your business hasn't approved for customer data.

1. Starting point

> I own a [type of] business. [Size, staff.] We're [the problem in plain words]. I don't know if I need [the fixes you're considering]. Where do I start?

2. Sorting your records

> Here are [call log, estimate list, schedule] from the last 30 days with customer info removed. Sort these and tell me where work is waiting. Give me a hypothesis, not a conclusion, and tell me what you're unsure of.

3. Correcting it with field reality

> [Person who knows the work] says [what they told you]. Does the data still support your hypothesis? What would change it?

4. Before buying or hiring

> Before I add capacity, help me get more out of the step I have. Here's a log of my day. What's going to work that only this step can do, and what isn't?

5. Sorting what needs the bottleneck

> Here are the last [number] jobs that waited on this step, by type. Help me sort which ones truly need [person or step] and which could be handled another way with a rule or a checklist.

6. Turning the idea into a scope

> Turn this into a one page scope: what it does, who uses it, what stays with a person, how we'll know it works, and a trial period.

7. Drafting the smallest fix

> Draft a one page [checklist, price sheet, template] for [who] to use [where]. Must work on a phone. Short. I'll review it.

8. A simple daily list

> Each morning [person] pastes in [the list]. Give back items that are past [time limit], and draft a short message for each. Use job numbers only. A person reviews every message before it goes out.

9. Measuring

> Here are the same reports for the [weeks] since we made the change. Compare to before using these measures: [your 3 or 4 measures]. Tell me what changed and what you're not sure about.

10. Finding the next one

> [The first step] is moving now. But [new pile] is building up. Here's the data. Hypothesis only. Then help me sort fixes into cheap and quick, small cost, and bigger cost.

APPENDIX B

Find the Bottleneck Worksheet

Use a pencil. Fill it in with real records, not memory.

1. Your one main measure for this cycle. Completed jobs, profit, cash or owner hours. Pick one.

_____

2. Map a job from first call to paid. Write how long work usually waits at each step.

Step	Who does it	Usual wait	Work waiting now
Call answered			
Estimate sent			
Customer says yes			
Job scheduled			
Job done			
Invoice paid			

3. Your hypothesis. "It looks like _____ may be limiting _____, because _____."

_____

4. Who checked it against field reality? Name, and what they corrected.

_____

5. Get more from it first. One change that costs little or nothing.

_____

6. What starves or interrupts it? Habits or rules to change.

_____

7. What stays with a person? Pricing, safety, anything unusual.

_____

8. How you'll know it worked. Up to four measures, written down before you start.

Measure	Before	Check date	After

9. Where did it move? After the trial, what's piling up now?

_____

Your Next Step

If this story sounded like your business, start the way Ray did: find the one step every job waits on, try the smallest fix, and measure it.

The free course *Your First AI Build, Scope First* walks you through picking that first piece and building it safely.

agenticsolutions.biz/course/first-build

For one practical idea a week on AI for business owners, get the *Main Street AI Brief*.

agenticsolutions.biz/brief

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