

SAMPLE · FICTIONAL BUSINESS

OVERHEAD RESCUE

Your AI Overhead Rescue Plan

A practical efficiency audit for Coastal Air & Heat.

PREPARED FOR
Mike, Owner

LOCATION
Oceanside, California

BUSINESS
Coastal Air & Heat

DATE
September 2026

SECTION 1

01

Your biggest AI opportunities

Coastal Air & Heat does not need a technology overhaul. It needs three manual processes to stop eating the week.

8 people

Two office staff support six field technicians.

$400/mo

Current software spend across ServiceTitan and QuickBooks Online.

60 reviews

A 4.6-star Google profile, versus 150 to 300 reviews for top Oceanside competitors.

3 drains

Quote follow-up, appointment confirmations, and Sunday post writing.

Coastal Air & Heat runs scheduling and dispatch in ServiceTitan and accounting in QuickBooks Online. That is a sensible foundation. The problem is not the tools. It is the gap between the tools and the way the office works today.

Quotes are followed up from memory. Lisa spends her mornings calling to confirm appointments. Mike writes every Facebook and Google post himself on Sundays. With two office employees supporting six technicians across four North County cities, those habits cost more than they look like they cost.

Audit conclusion: Start with follow-up and confirmations. They are closest to revenue and payroll. Marketing assistance comes third, because it gives Mike time back without handing his voice to a machine.

SECTION 2 · RANKED BY VALUE AND DIFFICULTY

02

Your quick wins

Do these in order. The first two turn ServiceTitan from a calendar into an active part of Coastal Air & Heat's office team.

1

DO FIRST

Turn on automated appointment reminders in ServiceTitan

Value: Saves Lisa about 8 hours a week, roughly $867 a month at $25 per hour.

Difficulty: Easy.

Time to set up: One afternoon with the ServiceTitan representative.

Text customers 24 hours before the appointment and again the morning of. Lisa only calls non-responders.

2

Build a quote follow-up text sequence

Value: Recovers an estimated 2 lost jobs a month, about $1,600 a month at an $800 average job.

Difficulty: Easy.

Time to set up: About 2 hours for Lisa, then 20 minutes each Friday.

Use touches on day 1, day 3, day 7, and day 14. Day 7 is a call from Lisa, not another automated message.

SECTION 3 · PRIORITY 1

03

Your recommended AI stack

The best tool in this plan is the one Coastal Air & Heat already pays for.

1 · SERVICETITAN AUTOMATIONS

Use the features already inside scheduling and dispatch

What it does: Automated appointment reminders, text messaging, and follow-up campaign features.

Cost: Included in the current plan, subject to confirmation with the ServiceTitan representative.

Exactly how Coastal Air & Heat uses it:

- Text every customer 24 hours before an HVAC appointment and again the morning of.
- Send the day 1, day 3, and day 14 quote follow-up messages.
- Create a day 7 call task for Lisa.
- Keep each quote marked won or lost, with a reason, so Mike can see what is working.

Before buying anything: Mike should ask the ServiceTitan representative which messaging and campaign features are included in Coastal Air & Heat's current plan. The audit assumes the current package supports these features, but the representative should confirm.

SECTION 4 · WORKFLOW A

04

Never lose a quote to silence again

Every Coastal Air & Heat estimate gets a clear next action until it is won or lost.

1. When an estimate is sent from ServiceTitan, tag it **“Quote sent”** the same day.
2. **Day 1:** The automated text goes out using the template in section 5.
3. **Day 3:** A second text gives the homeowner a friendly nudge and offers to answer questions about the recommended system or repair.
4. **Day 7:** ServiceTitan gives Lisa a task to call. This is a human conversation, not another text.
5. **Day 14:** A final text goes out. Then mark the estimate won or lost with a reason.
6. **Every Friday:** Lisa spends 20 minutes clearing the open-quote list.

Why this fits an HVAC shop: Home comfort decisions can stall because of price, timing, or confusion about equipment. A useful follow-up does not pressure the customer. It makes the next step easy while the estimate is still relevant.

SECTION 6 · DAYS 1 TO 7

06

Your 90-day implementation plan

Week one is about turning on what Coastal Air & Heat already owns.

1 Enable automated reminders and texting

Owner: Mike

Time: 1 hour

Call the ServiceTitan representative. Confirm the current plan includes automated reminders, customer texting, and campaign features. Turn on the 24-hour and morning-of appointment reminders.

2 Build the quote follow-up campaign

Owner: Lisa

Time: 2 hours

Load the day 1, day 3, and day 14 texts from Workflow A. Add a day 7 call task. Test the full sequence using an internal record before applying it to open quotes.

3 Order QR review cards

Owner: Office manager

Time: 30 minutes

Create the card with Coastal Air & Heat's real Google review link. Order enough for all six technician trucks and the office.

THE SAVINGS ESTIMATE

06

About $2,935 a month in potential net benefit

These are planning estimates, not guarantees. The assumptions are stated plainly so Mike can replace them with actual Coastal Air & Heat results after 90 days.

AREA	ASSUMPTION	MONTHLY VALUE
Dispatcher time	8 hours per week saved at $25 per hour	$867
Recovered jobs	2 jobs per month at $800 average	$1,600
Owner time	1.5 hours per week at $75 per hour	$488
New costs	ChatGPT Plus	($20)
Net benefit	**Estimated monthly value after new cost**	**About $2,935**

Assumption notes

- Lisa's wage and hours come from intake patterns.
- Two recovered jobs is conservative for a shop sending about 12 quotes a week with no follow-up system.
- Mike's hourly value is his own estimate of owner time.

Payback: The $297 audit pays for itself in about 3 days of these savings.