

FOR TRADES BUSINESS OWNERS

# The Trades AI Field Guide

What to automate first, what to skip, and the seven questions to ask before you pay for anything.

START HERE

# Most AI advice is written for people with desk jobs

Nearly everything written about AI assumes you sit in front of a computer all day. You do not. You are in an attic, under a sink, or on a roof, and the software conversation is happening somewhere you are not.

So here is the honest version, written for a business where the owner still swings a wrench.

The only rule that matters: automate the work that repeats, follows a pattern, and does not require your hands. That is it. Everything in this guide comes from that one test. If a task fails it, no tool will save you.

Notice what that rule excludes. It does not automate the diagnosis, the craftsmanship, or the judgment call about whether a system is worth repairing. Those are why customers pay you. It automates the paperwork stacked around them.

# The five jobs worth automating first

1

## Quoting and proposals

The single highest payback in the trades. Turning notes into a professional quote same day, rather than at nine at night, wins jobs you are currently losing on speed alone.

2

## Follow up on open quotes

Most unsold quotes never get a second touch. Automated, personal follow up on a schedule is the cheapest revenue available to you, because the work is already found.

3

## Review requests

Asked at the right moment, consistently, forever. Local search rewards this more than almost anything else you can do, and most competitors do it inconsistently or not at all.

4

## Recurring revenue reminders

Maintenance agreements and service plans renew only if someone asks. Automating the ask protects the most profitable revenue you have.

5

## Marketing content

Seasonal offers, service pages, and social posts drafted in your voice for your area. Replaces a retainer you either pay for or do without.

# What to skip, and why

This is the chapter nobody selling software will write for you. Most wasted spend in a trades business goes to these four categories.

## Anything replacing your judgment

Diagnostic tools that claim to tell you what is wrong with a system. You are better at this than the software, and being wrong costs you a callback and a reputation.

## All in one platforms you will use 10% of

The temptation is a single system that does everything. What actually happens is a large monthly bill, a painful migration, and your team using three features. Start with what you already pay for.

## Anything requiring a new daily habit from the crew

If a tool needs your techs to log something extra on every job, it will be abandoned within a month. Adoption is the entire game, and field crews vote with their behavior.

## Content that sounds like everyone else

Generic AI marketing copy is worse than no marketing, because it signals you are not paying attention. If it does not sound like you, do not send it.

# Seven questions to ask before you pay for anything

1. What specific hours does this give me back each week, and what will I do with them?
2. Does this work with the software I already pay for, or does it replace it?
3. What does my crew have to do differently? If the answer is anything, how will I get them to?
4. What happens to my data if I cancel in six months?
5. Can I try it on one crew or one job type before committing everyone?
6. Who sets it up, and what does that cost on top of the subscription?
7. If this works exactly as promised, how many extra jobs a month does it need to produce to pay for itself?

If a salesperson cannot answer question seven with a number, you are not talking to a partner. You are talking to a vendor.

## CHAPTER 4

# A 30 day rollout that will not blow up your week

### WEEK 1

#### **Pick one problem, not five**

Choose the single most expensive leak: usually slow quotes or missing follow up. Write down what it currently costs you in jobs per month. That number is your scoreboard.

### WEEK 2

#### **Set up one workflow**

Configure one thing properly, in your voice and your pricing. Resist adding a second until the first one runs for a week without you thinking about it.

### WEEK 3

#### **Run it on real jobs**

Use it on actual work and fix what is wrong. Expect the first drafts to need editing. That is normal and it gets better fast as you correct it.

### WEEK 4

#### **Check the scoreboard, then add one**

Compare against your week one number. If it moved, add the next workflow. If it did not, find out why before spending another dollar.

WHERE WE COME IN

# You do not have to figure this out on your own

Aisling Consulting does this work for trades and local service businesses. We start with a free assessment: we look at how your business actually runs, tell you which one or two things are worth automating, and give you the honest answer if the answer is none of it. You keep the plan either way.

We do not resell software and we do not take referral money to push a platform. We get paid to make your business work better, which sometimes means telling you the free option is enough.

## Book a free assessment

Thirty minutes, no obligation, no pitch.

**Book a call**

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