trenton.

SAMPLE REPORT · INVENTED BUSINESS

AI Assessment Report

An 8-person building and renovation firm. Where AI can save the team time and money, ranked and costed, and the first quick win already built.

Assessment day
One day on site with the owner, the office manager and a site lead

Prepared by
Magnus Gerber, Trenton Consulting

Issued
Five working days after the day

This report describes an invented business. It shows the format and depth of a real assessment report. All names, figures and findings are illustrative.

SUMMARY

About 14 hours a week back, for around £55 a month.

The business is busy and well run on site. The time goes in the office and the evenings: quotes typed up late, invoices chased by phone and customers ringing to ask when the team will arrive.

14 hrs
a week saved across the team, with all five in place

£55
a month in new tool costs, roughly

1
quick win already built and working

Start with these three

1. **Quotes from on-site voice notes.** The owner stops typing quotes in the evening. Already built.
2. **Automatic invoice reminders.** Late payers get a polite email, then a firmer one, before anyone picks up the phone.
3. **Evening job updates to customers.** One short message a day, so the office phone rings less.

BUILT WITH YOU

Voice note to draft quote

The owner records a voice note while walking the job. Within a few minutes a draft quote arrives by email, laid out in the firm's template and priced from its own rate sheet. The owner checks it, adjusts anything that looks wrong and sends it. We set this up together and tested it on two real jobs.

WHERE THE TIME GOES

Most of the lost hours are admin, and most of it is repeated.

These figures come from the day itself: watching the work and asking each person to walk through a normal week. They are estimates, rounded to the nearest hour.

TASK	WHO	HOURS A WEEK	WHAT WE SAW
Writing quotes	Owner	8	Typed up most evenings from notes and photos taken on site
Customer calls about timings	Office manager	4	The same question, asked several times a day
Chasing unpaid invoices	Office manager, owner	3	Phone calls and one-off emails, no set routine
Ordering materials	Site lead	3	Lists rebuilt by hand from the quote for each job
Timesheets	Office manager	2	Collected by text message and typed into a spreadsheet
Asking for reviews	Nobody	0	Rarely done, though happy customers say they would leave one
Total		**20**	

> Quoting is the biggest single cost, and it lands on the owner, whose time is worth the most. It is also the easiest to fix, which is why we built it on the day.

What is already working

The firm uses cloud accounting software and a shared calendar, and everyone has a smartphone. That matters: almost everything in this report builds on tools the team already has, rather than adding new systems to learn.

FINDINGS, RANKED

Ranked by what each one pays back for the effort it takes.

1 Quotes from on-site voice notes

BUILT ON THE DAY

NOW

The owner types each quote from scribbled notes and photos, usually after 8 p.m. Quotes go out two or three days after the visit.

WITH AI

A voice note becomes a draft quote in the firm's template, priced from its rate sheet. The owner checks and sends it the same day.

6 hrs a week saved **About £20** a month **Effort:** done

2 Automatic invoice reminders

NOW

Late invoices are noticed when cash is tight, then chased by phone. It is awkward, so it gets put off.

WITH AI

The accounting software sends a polite reminder at 7 days overdue and a firmer one at 14. AI drafts the wording in the firm's tone. Only the stubborn cases reach the owner.

3 hrs a week saved **£0**, already paid for **Effort:** half a day

3 Evening job updates to customers

NOW

Customers ring the office to ask when the team is arriving and how the job is going.

WITH AI

Each evening, a short text or email goes to every live customer, written from the next day's calendar and the site lead's notes.

3 hrs a week saved **About £15** a month **Effort:** two days to set up

FINDINGS, RANKED

4 Materials lists straight from the quote

NOW

The site lead rebuilds a materials list by hand for every job, then rings the merchant.

WITH AI

Once a quote is accepted, a draft materials list is produced from it, grouped by supplier, for the site lead to check and order.

2 hrs a week saved **About £20** a month **Effort:** builds on finding 1

5 Review requests when a job finishes

NOW

Happy customers are rarely asked for a review, so the firm's online rating undersells its work.

WITH AI

When the final invoice is paid, the customer gets a short thank-you with a review link, mentioning the job by name.

More reviews, not hours **£0**, already paid for **Effort:** an hour

Looked at and left out

Timesheets (2 hours a week) could be automated, but the saving does not yet justify a new app for the team to learn. Worth revisiting if the team grows.

Your data

- Customer names, addresses and job details may go into the tools above. All of them are business accounts that do not use your data to train AI.
- Bank details and payment card numbers never go into AI tools.
- Nothing sends to a customer without a person checking it first, until you choose otherwise.

WHAT TO DO NEXT

A plan for the next three months.

This month

Use the quote tool on every job and note anything it gets wrong. Switch on invoice reminders in the accounting software.

Next month

Set up evening job updates. Start review requests on finished jobs.

Month three

Add materials lists to the quote tool. Check the hours saved against this report.

What you can do yourselves

Invoice reminders and review requests are settings in software you already use. The office manager can switch both on in an afternoon, using the wording we supply.

Where Trenton can help

Evening job updates and materials lists need connecting to the calendar and the quote tool. Trenton can build both, and the £495 assessment fee comes off that work.

> **Most AI consultants tell you what to do. We build it with you.**

Magnus Gerber · Trenton Consulting · trenton.consulting · office@trenton.consulting