

VOL. I MORE JOBS · LESS PAPERWORK

BLOO-COLLAR AIIP INSTALL PROTOCOL.

Win more jobs. Get paid faster. Less time on the phone, more time in the field. This is the install – your own AI back office that does the office work so you never have to. The same tools the big companies run, built for the trades. You own all of it.



PREPARED BY

Bloo-Collar

AI for the working class

FOR

The Trade Owner

contractors · trades · home
service

DOCUMENT

Vol. I – Complete

2026

INVESTMENT

\$100 Install

credited toward any build

01 THE INSTALL

What this is, why it costs what it costs, and what you walk away with.

THE DEAL

We help blue-collar businesses **win more work, run the office on autopilot, and grow – without hiring office staff.** This book is the install. You walk away with your own AI back office that answers the phone, drafts the quotes, books the jobs, chases the money, and asks for the reviews – while you stay on the tools.

Part One builds your AI back office – the engine that does the office work for you, running on your own computer for almost nothing. **Part Two points it at your customers** – getting found, booking jobs, getting paid, and earning reviews. You own the whole thing. Start here for \$100; one job you would have lost pays for it many times over.

WHAT IT IS	The AIIP Install – your AI back office, then your AI front office
WHO IT'S FOR	Contractors and trades who want more jobs and less paperwork
WHAT IT DOES	Wins more work · books the jobs · gets you paid · earns reviews
YOU WALK AWAY WITH	Your own AI back office · this playbook · every command · your roadmap
INVESTMENT	\$100, one-time – credited toward any build
TERMS	Due before the install begins

WHAT YOU'RE REALLY BUYING

More jobs, more profit, and **less paperwork.** You're not paying for "AI" – you're paying for the install: every tool set up, tested, and pointed at your business in the right order. That is the value.

02

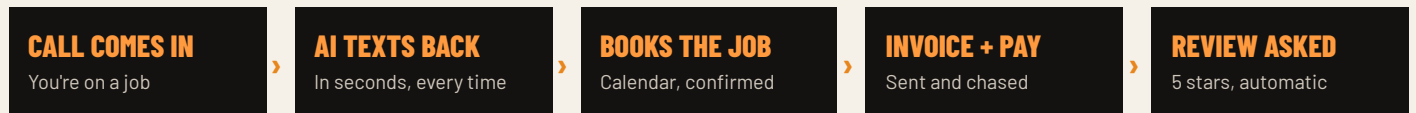
WIN MORE, HIRE NOBODY

How you compete with the big companies – without adding a single office person.

The big companies don't out-work you. They **out-staff** you. They have a front desk that never sleeps and a back office that runs while everyone's home. You've been doing all of that yourself – at night, between jobs.

This gives you the same staff **without the payroll**. Every call answered. Every lead chased. Every invoice paid. Every review asked for. More jobs in, more money in, less paperwork – and not one new hire.

THE LEAD, FULLY HANDLED



WHAT IT'S WORTH, IN PLAIN DOLLARS

Miss 5-10 calls a week and you're losing **\$45,000 to \$120,000 a year** to the other guy. Catching those calls alone pays for the whole build many times over – and it only grows from there: faster quotes, fewer no-shows, more reviews, more work.

WHY IT WORKS

We don't reinvent the tools – we use the proven ones and **set them up in the right order, pointed at your business**. That order is the whole game, and it's what you're buying. You own the result.



PART ONE

YOUR AI BACK OFFICE

THE NEW WORLD

This is the part most owners have never seen. You're about to install your own AI back office – software that drafts your estimates, answers your phone, follows up on every lead, and chases every invoice. It runs on your own computer. It never clocks out, never asks for a raise, and costs almost nothing to run. The big companies pay a staff to do this. **You're about to own it outright.**

YOUR AI BACK OFFICE

An office staff that never sleeps – set up on your own computer, working for you, for almost nothing.

Hiring an office person costs **\$40,000 a year**. This costs you an afternoon to set up and almost nothing to run. It drafts the quotes, answers the calls, sends the follow-ups, and asks for the reviews – all day, every day, no paycheck. **Build it once and it works forever.**

Nine stacks. Twenty steps. Every command is right here – copy, paste, done. Go in order and by the end you own a machine most of your competitors don't even know exists.

#	WHAT YOU BUILD	WHAT IT DOES FOR YOU
XI	THE FOUNDATION	The base tools your AI runs on – set up once, then forgotten
XII	THE DEV ENVIRONMENT	The fuel the AI needs to run – installed and out of your way
XIII	YOUR AI BUILDER	AI that does the technical setup for you – you just say what you want
XIV	FREE, PRIVATE AI	Capable AI running right on your own computer, for free
XV	THE TRAFFIC COP	Routes every job to the cheapest tool – keeps it running for pennies
XVI	RUN IT FROM YOUR PHONE	A private bot so you can run the whole thing from the truck
XVII	THE AUTOPILOT	Runs your follow-ups, reviews, and campaigns without you
XVIII	THE SECOND BRAIN	One place that holds every customer, job, and note
XIX	BACKED UP & YOURS	Your data saved three ways – you own all of it

ALMOST FREE TO RUN

Most of this runs on free apps, your own computer, and one flat plan you may already pay for. The wiring that ties it together is free too. You build it once – then it works for **pennies, not a payroll.**



STACK XI

THE FOUNDATION

STACK 1 OF 9

This is where the machine starts. Before the AI can answer a call or draft a quote, it needs a home on your computer — the base tools everything else installs on. **A few commands and the foundation is set.** You only do this once.

INSTALLS

The base tools your AI back office runs on — set up in a few minutes.

STACK XI · THE FOUNDATION

01

STEP 01 – APPLE TOOLS + PACKAGE MANAGER

INSTALL THE XCODE TOOLS AND HOMEBREW

Apple's command-line tools give you the compilers and Git; Homebrew is the package manager that installs nearly everything else in Part Two. On Apple Silicon, Homebrew lives at `/opt/homebrew` and needs two `PATH` lines after the install.

TERMINAL · ZSH

```
xcodeselect --install
# then install Homebrew (one line):
/bin/bash -c "$(curl -fsSL https://raw.githubusercontent.com/Homebrew/install/HEAD/install.sh)"
# add brew to your PATH (Apple Silicon):
echo 'eval "$(/opt/homebrew/bin/brew shellenv)"' >> ~/.zprofile
eval "$(/opt/homebrew/bin/brew shellenv)"
```

VERIFY → Run `brew --version`. It prints a version number.

NOTE

On Windows, do all of Part Two inside **WSL2**(Ubuntu) – the commands are identical from there.

02

STEP 02 – A PRODUCTIVE SHELL

INSTALL OH MY ZSH

Oh My Zsh turns the default shell into a themeable, plugin-rich environment that every other tool assumes you have. Optional in theory, expected in practice.

TERMINAL · ZSH

```
sh -c "$(curl -fsSL https://raw.githubusercontent.com/ohmyzsh/ohmyzsh/master/tools/install.sh)"
# recommended plugins in ~/.zshrc:
# plugins=(git brew npm python macos zsh-autosuggestions zsh-syntax-highlighting)
```

VERIFY → Run `echo $ZSH`. It prints a path ending in `/.oh-my-zsh`.

NOTE

If a command can't be found after this, close and reopen Terminal so the new shell config loads.

STACK XI · THE FOUNDATION (CONTINUED)

03

STEP 03 – VERSION CONTROL + GITHUB

INSTALL AND CONFIGURE GIT + THE GITHUB CLI

Git ships with the Apple tools; the GitHub CLI (`gh`) makes auth, cloning, and backups smooth. Set your identity once and the GitHub login here is what powers the dotfiles backup in Step 20.

```
TERMINAL · ZSH  
  
brew install gh git  
gh auth login          # browser-based OAuth  
git config --global user.name "[Your Name]"  
git config --global user.email "[you@email.com]"  
git config --global init.defaultBranch main
```

VERIFY → Run `gh auth status`. It shows you logged in to github.com.

NOTE

Treat this GitHub account as part of the business — it will hold your code, your configs, and your recovery path.



STACK XII

THE DEV ENVIRONMENT

STACK 2 OF 9

A few small tools the AI needs to run – think of it as the fuel and the toolbox. **Get them in now and everything after just works.** You won't touch these again.

INSTALLS

The fuel the AI runs on – installed once, set and forget.

STACK XII · THE DEV ENVIRONMENT

04

STEP 04 – JAVASCRIPT RUNTIME

INSTALL NODE.JS AND PNPM

Node runs your front-office server (from §The Build) and both build agents; pnpm is the fast package manager they use under the hood.

```
TERMINAL · ZSH  
  
brew install node  
npm install -g pnpm
```

VERIFY → Run `node -v` && `pnpm -v`. Both print a version (Node 20 or higher).

NOTE

Want to switch Node versions per project later? Install `nvm` or `fnm` – for most setups the Homebrew install is simpler to support.

05

STEP 05 – PYTHON + RUST

INSTALL PYENV, PYTHON, AND THE RUST TOOLCHAIN

Python powers the Telegram and automation glue and most scripting; pyenv switches versions cleanly without touching the system Python. Rust is needed by a handful of tools that compile from source.

```
TERMINAL · ZSH  
  
brew install pyenv  
pyenv install 3.12.6  
pyenv global 3.12.6  
echo 'eval "$(pyenv init -)"' >> ~/.zshrc  
# Rust toolchain:  
curl --proto '=https' --tlsv1.2 -sSf https://sh.rustup.rs | sh -s -- -y  
source ~/.cargo/env
```

VERIFY → Run `python --version` && `cargo --version`. Both print a version.

NOTE

Open a fresh terminal after this so the new PATH and the pyenv hooks load.



STACK XIII

THE AGENT CLIS

STACK 3 OF 9

This is your AI builder. It writes and runs the rest of the setup **for you** – you mostly just say what you want in plain English. We put three of them on so you're never stuck waiting.

INSTALLS

Your AI builder – it does the technical work so you don't have to.

STACK XIII · THE AGENT CLIS

06

STEP 06 – THE BUILD AGENTS

INSTALL CLAUDE CODE, OPENCODE, AND CODEX

These are terminal-resident AI agents that read, write, and run code for you – they can stand up the entire §Build on command. Install all three so you are never locked to one provider.

```
TERMINAL · ZSH

# daily driver (runs on a Claude Pro / Max plan):
npm install -g @anthropic-ai/claude-code
# free, bring-your-own-key alternative:
brew install sst/tap/opencode
# OpenAI's agent, for redundancy:
npm install -g @openai/codex
claude      # launch + sign in on first run
```

VERIFY → Run `claude --version` && `opencode --version`. Both print a version.

NOTE

`claude` signs in through your Claude plan; `codex` through your OpenAI account. One flat plan powers the daily driver – no metered API bills.



STACK XIV

THE LOCAL AI

STACK 4 OF 9

AI that runs **right on your own computer** – free every time you use it, and private. Anything you'd rather not put online – your prices, your customer list – runs here and never leaves the machine.

INSTALLS

Free, private AI on your own computer – covers almost everything.

STACK XIV · THE LOCAL AI

07

STEP 07 – LOCAL MODEL RUNTIME

INSTALL OLLAMA

Ollama runs open AI models entirely on your machine – zero cost per call, fully private, works offline. It is the free lane of the fleet, installed.

```
TERMINAL · ZSH  
  
brew install ollama  
brew services start ollama # runs in the background on every boot
```

VERIFY → Run `ollama --version` and `curl http://localhost:11434/api/version`. The local API responds.

NOTE

Models live in `~/.ollama`. Keep **10+ GB free** before pulling the bigger ones.

08

STEP 08 – THE MODEL LIBRARY

PULL THE MODELS THAT COVER 95% OF THE WORK

Pull what fits your machine. A small model runs on anything; the bigger ones write better but need more memory.

```
TERMINAL · ZSH  
  
# runs on any machine (16 GB Mac: stop here):  
ollama pull llama3.2:3b # ~2 GB, general chat  
ollama pull qwen2.5-coder:7b # coding  
ollama pull hermes3 # ~5 GB, agentic  
# 32 GB+ machines unlock the big ones:  
ollama pull llama3.3:70b # ~40 GB  
ollama pull deepseek-coder-v2 # ~9 GB
```

VERIFY → Run `ollama list`. It shows the models you pulled.

NOTE

On a 16 GB Mac, stick to `llama3.2:3b` and `qwen2.5-coder:7b`. More memory unlocks the sharper 70B models.

STACK XIV · THE LOCAL AI (CONTINUED)

09

STEP 09 – PROVE THE LOCAL STACK

RUN A MODEL OFFLINE

Before wiring anything, confirm the local lane works by chatting with a pulled model – with the wifi off. If it answers, your entire free AI lane is live.

```
TERMINAL · ZSH
ollama run llama3.2:3b
>>> draft a friendly missed-call text for a plumber
>>> /bye          # exits
```

VERIFY → Turn off wifi, then run the model. It still answers – fully offline.

NOTE

This is the proof that the zero-cost lane works. Anything private – customer lists, pricing – can run here and never leave your machine.



STACK XV

THE ORCHESTRATOR

STACK 5 OF 9

The traffic cop. It sends each job to the cheapest tool that can do it – usually a free one – so your AI runs for **pennies, not a payroll**. This is what makes the whole thing nearly free to run.

INSTALLS

The traffic cop that keeps your AI running for pennies.

STACK XV · THE ORCHESTRATOR

10

STEP 10 – INSTALL THE ORCHESTRATOR

INSTALL OPENCLAW

OpenClaw is the open-source router that ties the fleet together – Claude, your local models, the free tiers – and makes Telegram and other surfaces addressable. One command, then a short setup wizard.

```
TERMINAL · ZSH
curl -fsSL https://openclaw.ai/install.sh | bash
```

VERIFY → Run `openclaw --version`. It prints a version.

NOTE

If the install fails, the usual cause is an old Node – confirm `node -v` is 20+ from Step 04.

11

STEP 11 – WIRE THE FOUR LANES

ONBOARD, SET THE KEYS, AND ROUTE THE FLEET

Install the background gateway, give it your keys, and tell it about each lane so it routes intelligently – your flat-rate plan, your local models, and the free tiers.

```
TERMINAL · ZSH
openclaw onboard --install-daemon
# set the keys for the metered / free lanes:
echo 'export ANTHROPIC_API_KEY="sk-ant- ..."' >> ~/.zshrc
echo 'export OPENAI_API_KEY="sk- ..."' >> ~/.zshrc
echo 'export GOOGLE_API_KEY=" ..."' >> ~/.zshrc
source ~/.zshrc
openclaw config edit # enable anthropic / ollama / chatgpt-plus / gemini
openclaw gateway restart
```

VERIFY → Run `openclaw status`. All four lanes show OK · ready.

NOTE

Three of the four lanes are free at the margin – local models, the free tiers, and your flat-rate plan. Only Anthropic meters, and it runs against your Pro plan.

STACK XV · THE ORCHESTRATOR (CONTINUED)

12

STEP 12 – CONFIRM THE GATEWAY

CHECK THE DAEMON AND OPEN THE DASHBOARD

The gateway runs as a background daemon on port 18789. Two checks confirm it is wired: a healthy status, and the dashboard opening in your browser.

TERMINAL · ZSH

```
openclaw gateway status
openclaw dashboard      # opens http://127.0.0.1:18789
```

VERIFY → Run `curl -s http://127.0.0.1:18789/healthz`. It returns ok.

NOTE

The dashboard is your at-a-glance view of every lane and channel – handy for debugging, and for showing off.



STACK XVI

THE CONTROL SURFACE

STACK 6 OF 9

Your phone becomes the remote. From any job site you can pull today's leads, draft a quote, or fire a campaign – **just by texting your own bot.**

INSTALLS

A private Telegram bot, registered and wired into the orchestrator, locked to you.

STACK XVI · THE CONTROL SURFACE

13

STEP 13 – REGISTER THE BOT

CREATE A TELEGRAM BOT WITH BOTFATHER

Telegram is the remote control. Create a bot inside the app; BotFather hands you a token. Treat that token like a key.

```
TERMINAL · ZSH

# in Telegram, message @BotFather:
/newbot
→ name:      [Business] Front Office
→ username:  yourbiz_office_bot
→ token:     1234567890:ABC-DEF...the-token...
```

VERIFY → Open the **t.me** link BotFather sends. Your bot opens, ready to message.

NOTE

Save the token in your password manager. Anyone who has it controls the bot.

14

STEP 14 – WIRE THE BOT IN

CONNECT TELEGRAM TO THE ORCHESTRATOR

Add the token to OpenClaw's channel config, restart the gateway, and approve your own chat so that only you can command it.

```
TERMINAL · ZSH

openclaw config edit
# channels: { telegram: { botToken: "...", allowedChats: [] } }
openclaw gateway restart
openclaw pairing approve telegram <your-chat-id>
```

VERIFY → Text your bot **/start**. It replies – the bridge is live.

NOTE

By default no one can talk to the bot until approved. To find your chat ID, message it once, then run `openclaw logs | grep telegram`.



STACK XVII

THE AUTOMATION ENGINE

STACK 7 OF 9

This is the part that wins back your nights. It runs the follow-ups, the review requests, and the seasonal offers **without you touching a thing**. Set it up once; it works every day after.

INSTALLS

One free engine that runs your follow-ups, reviews, and campaigns on autopilot.

STACK XVII · THE AUTOMATION ENGINE

15

STEP 15 – RUN THE AUTOMATION ENGINE

START N8N

n8n is the free, self-hosted, no-code engine that runs every automation from Phases V–VIII. One command starts the visual editor.

```
TERMINAL · ZSH
npx n8n # opens the editor at http://localhost:5678
```

VERIFY → Open `localhost:5678`. The n8n editor loads in your browser.

NOTE

Prefer something hosted? Zapier and Make do the same with a friendlier free tier – see the Curated Stack.

16

STEP 16 – WIRE THE WORKFLOWS

BUILD THE FOLLOW-UP, REVIEW, AND BLAST FLOWS

Drag nodes to build the back office: the Day 1/2/5/14 sequence, the after-job review request, and the monthly campaign – no code. Build it once and it runs forever.

```
TERMINAL · ZSH
# Workflow 1 – the follow-up sequence
Webhook (new lead)
  → Wait 1d → SMS "Day 1 follow-up"
  → Wait 1d → SMS "Day 2 follow-up"
  → Wait 3d → SMS "Day 5 follow-up"
  → Wait 9d → SMS "Day 14 – closing the loop"
# Workflow 2 – on "job done" → send the review SMS
# Workflow 3 – monthly schedule → past-customer blast
```

VERIFY → Fire a test webhook. The Day 1 SMS reaches your phone on schedule.

NOTE

Add a Telegram trigger (Step 14) and you can fire any of these from your phone, from the truck.



STACK XVIII

THE SECOND BRAIN

STACK 8 OF 9

One searchable place for every customer, job, decision, and note — so the business lives somewhere other than your head.

INSTALLS

Notion + Obsidian, wired to one synced vault.

STACK XVIII · THE SECOND BRAIN

17

STEP 17 – THE SECOND BRAIN

INSTALL NOTION + OBSIDIAN

One searchable home for every customer, job, decision, and note. Notion for shared dashboards; Obsidian for private, offline notes – synced through one folder.

TERMINAL · ZSH

```
brew install --cask notion obsidian
# point Obsidian at a folder inside iCloud (Step 18) so the
# whole vault syncs to your phone for free.
```

VERIFY → Run `ls /Applications | grep -E 'Notion|Obsidian'`. Both apps are installed.

NOTE

Notes are just files. Keep the Obsidian vault in iCloud and your second brain rides along to every device, free.



STACK XIX

BACKUP & OWNERSHIP

STACK 9 OF 9

The recovery story. A lost laptop becomes an inconvenience, not a catastrophe – and the whole stack stays **yours**. This is the phase others skip and later regret. We do not skip it.

INSTALLS

iCloud sync of the working data, a scheduled workspace mirror, Time Machine, and dotfiles versioned to GitHub.

STACK XIX · BACKUP & OWNERSHIP

18

STEP 18 – CROSS-DEVICE SYNC

TURN ON ICLOUD DRIVE + THE FLEET FOLDER

Put your high-value working data in iCloud so it syncs everywhere and survives a dead laptop. Create one top-level folder for everything the stack backs up.

```
TERMINAL · ZSH

# enable iCloud Drive + Desktop & Documents in System Settings, then:
ln -s "$HOME/Library/Mobile Documents/com~apple~CloudDocs" ~/iCloud
mkdir -p ~/iCloud/Bloo/{Obsidian,OpenClaw,Dotfiles,Projects}
```

VERIFY → Run `ls ~/iCloud/Bloo`. It shows Obsidian / OpenClaw / Dotfiles / Projects.

NOTE

Keep secrets out of synced folders — API keys and the bot token live in your password manager, never in iCloud.

19

STEP 19 – MIRROR THE WORKSPACE

SYNC THE STACK ON A SCHEDULE (RSYNC + LAUNCHD)

Mirror the OpenClaw workspace — its memory, history, and your custom skills — to iCloud every 15 minutes, with credentials excluded on purpose.

```
TERMINAL · ZSH

cat > ~/.openclaw/sync-to-icloud.sh <<'EOF'
#!/bin/bash
rsync -a --delete --exclude='credentials/' --exclude='*.log' \
  "$HOME/.openclaw/workspace/" \
  "$HOME/iCloud/Bloo/OpenClaw/workspace/"
EOF
chmod +x ~/.openclaw/sync-to-icloud.sh
# schedule it every 15 min with a launchd plist, then seed it:
~/.openclaw/sync-to-icloud.sh
```

VERIFY → Run `ls ~/iCloud/Bloo/OpenClaw/workspace`. It mirrors your live workspace.

NOTE

Credentials are excluded on purpose. If you lose the machine you reissue keys — you never restore secrets from a sync.

STACK XIX · BACKUP & OWNERSHIP (CONTINUED)

20

STEP 20 – FULL-SYSTEM FALLBACK + OWN IT

TIME MACHINE AND DOTFILES TO GITHUB

Time Machine covers the whole disk; your dotfiles go to a private GitHub repo so a new machine is configured in minutes. Three layers of backup mean no single failure takes you down.

TERMINAL · ZSH

```
# Time Machine: System Settings → General → Time Machine → Add Disk
mkdir -p ~/iCloud/Bloo/Dotfiles && cd ~/iCloud/Bloo/Dotfiles && git init
cp ~/.zshrc ./zshrc
cp ~/.gitconfig ./gitconfig
gh repo create bloo-dotfiles --private --source=. --push
```

VERIFY → Run `tmutil status`. It shows Time Machine running.

NOTE

Local disk, local Time Machine, and the cloud – three layers. The customer list and the stack are **yours**, and they survive any one of them failing.



PART TWO

THE FRONT OFFICE

NOW POINT IT AT YOUR CUSTOMERS

The engine is built. Now we aim it at the work you already know — getting found on Google, answering every call, booking every job, getting paid faster, and turning happy customers into five-star reviews. These are the proven plays. They're simpler than Part One, and by the end your whole operation runs itself.

03

THE FOUR LANES

The four lanes the install puts to work.

ANSWER EVERYTHING. // CHASE NOTHING. // KEEP THE CASH.

01

THE FRONT DESK

An AI receptionist answers your phone, qualifies the caller, and books the job onto your calendar – 24/7, in your business's name. The lane that stops the bleeding first.

02

THE CATCH

Instant missed-call text-back and lead capture. The second you can't pick up, the lead gets a text and a path to book – so no job goes cold while you're up a ladder.

03

THE FOLLOW-UP

Automated reminders, estimate follow-ups, and re-engagement. Most owners send zero follow-ups; this lane sends them all, on schedule, until the job is won or closed.

04

THE REPUTATION

Automatic review requests after every job, Google follow-ups, and reputation monitoring. Great work nobody sees online stays invisible – this lane fixes that.

THE COMPOUNDING PART

Run all four lanes and the marginal cost of catching the next job at midnight is **functionally zero**. The corporations pay a team to do this. You'll have it installed for \$100 and a build.

04

THE PLAYS THAT FILL YOUR SCHEDULE

Ten plays — get found, answer every call, book the job, get paid faster, earn the review.
Each one wired to the AI back office you just built.

#	PHASE	WHAT GETS INSTALLED
I	FOUNDATION	Business audit + Google Business Profile claimed, optimized, and verified
II	THE FRONT DOOR	Mobile-first landing page that turns clicks into booked calls
III	AI FRONT DESK	AI receptionist: answers, qualifies, and books onto your calendar
IV	THE CATCH	Instant missed-call text-back + lead capture wired to your number
V	FOLLOW-UP ENGINE	Automated reminders, estimate chases, re-engagement sequences
VI	QUOTE & CASH	Estimate generation, invoicing, and payment-collection links
VII	REPUTATION MACHINE	Review requests, Google follow-ups, and reputation monitoring
VIII	THE MARKETING LOOP	Email campaigns, seasonal promos, and re-engagement on autopilot
IX	THE SECOND BRAIN	One dashboard: every customer, job, and dollar in a single place
X	BACKUP & OWNERSHIP	Your data backed up and yours — you own the system, not us

PRE-FLIGHT CHECKLIST

Before the install begins, the following must be true.

- You have a business phone number we can route the text-back and front desk to.

- You have (or are ready to claim) a Google Business Profile.

- You can name the 3-5 services you most want booked.

- You have a calendar (Google / Apple / your scheduler) we can wire to.

- You're ready to forward calls or set a simple follow-me number.

HEADS UP

None of this requires you to be technical. If a box isn't checked yet, that's fine — the install handles claiming the profile and setting up the calendar. This list just gets the fastest possible start.



PHASE I

FOUNDATION

PHASE 1 OF 10

Before a single call gets answered by AI, the foundation has to be solid. The free asset that decides whether you even **show up** when somebody nearby searches your trade. Skip it and everything downstream is pouring concrete on mud.

INSTALLS

Your Google Business Profile – claimed, filled, and optimized – plus a clean audit of where calls are leaking today.

PHASE I • FOUNDATION

01

STEP 01 – CLAIM & VERIFY THE LISTING

CLAIM & VERIFY YOUR GOOGLE BUSINESS PROFILE

Your Google Business Profile is the highest-ROI free asset a trade owns – it's what puts you on the map when someone nearby searches your trade. If you haven't claimed it, a competitor's listing is eating your calls.

DO THIS

- > Go to google.com/business and sign in with the email that should own the listing
- > Search your business name + city – claim it if it exists, create it if it doesn't
- > Start verification (video or postcard) and finish it – this is where most owners stall
- > Set the primary category to your exact trade ("Plumber," not "Contractor")

VERIFY → Search your business in Google Maps from your phone. It shows a "Verified" badge and a Call button.

NOTE

Postcard verification can take a few days – start it **now** so it's done before the front desk goes live. One listing per location; duplicates split your reviews and your ranking.

02

STEP 02 – FILL EVERY FIELD

FILL EVERY FIELD – SERVICES, AREA, HOURS, PHOTOS

A half-empty profile ranks lower and converts worse. Google rewards complete listings, and customers trust the one with photos and hours over the one without.

DO THIS

- > Add your 3–5 core services with short descriptions (and price ranges if you list them)
- > Set the real service area (towns/zips you actually drive to) and accurate hours
- > Upload 10+ real photos: trucks, crew, before/after, the logo
- > Add service options (on-site, online estimates) and payment methods

VERIFY → Open the Google Business dashboard. No "incomplete" prompts remain on the profile.

NOTE

Real phone photos beat stock every time. **Before/after shots** are the highest-converting images a trade can post – make them your first four.

PHASE I • FOUNDATION (CONTINUED)

03

STEP 03 – WIRE THE BUTTONS

WIRE THE BOOKING LINK + CALL AND TEXT BUTTONS

A profile that can't take an action is just a billboard. We turn it into a front door: tap to call, tap to text, tap to book – all routed to the system we install next.

DO THIS

- › Set the "Book" button to your Phase II landing page or scheduler link
- › Confirm the listed number is the one wired to missed-call text-back (Phase IV)
- › Turn on messaging only if it routes to the AI front desk – never to a dead inbox
- › Add the "Get a quote" call-to-action

VERIFY → From a phone that isn't yours, tap **Call** and tap **Book**. Both reach the right place on the first try.

NOTE

The number on this profile **must match** the number the front desk and text-back run on. Mismatched numbers are the #1 reason leads leak at this stage.

04

STEP 04 – AUDIT THE FOOTPRINT

AUDIT YOUR CURRENT FOOTPRINT FOR LEAKS

Before we build, find where calls are already falling out – old listings, wrong numbers, and dead links that quietly send paying customers to voicemail or a competitor.

DO THIS

- › Search your business name and check the top results for wrong info
- › Claim or fix duplicate listings (Yelp, Bing, Facebook, Apple Maps)
- › Forward or kill any old phone numbers still floating around
- › Write down today's star rating and review count – your Phase VII baseline

VERIFY → Compare name, address, and phone across every live listing. They all match exactly ("NAP consistency").

NOTE

Matching **Name, Address, Phone** everywhere tells Google you're one legit business. Inconsistency quietly tanks your ranking before you've spent a dollar.



PHASE II

THE FRONT DOOR

PHASE 2 OF 10

A click has to land somewhere that books a job, not a homepage that makes them think. We build one fast, mobile-first page that does one thing: turn a stranger into a booked call. **No \$10k website required.**

INSTALLS

A single mobile-first landing page with click-to-call, click-to-text, and a booking form that drops straight into your calendar.

PHASE II · THE FRONT DOOR

05

STEP 05 – BUILD THE PAGE

BUILD THE ONE-PAGE FRONT DOOR

One mobile-first page that loads fast and answers three questions in five seconds: what you do, where you do it, and why you. Nothing more — extra pages just leak attention.

DO THIS

- > State the trade and service area above the fold: "[Trade] in [City] – same-week service"
- > Add three proof points: years in business, reviews, licensed/insured
- > Show 3-4 before/after photos and a short list of services
- > One big button, repeated: Call · Text · Book

VERIFY → Open the page on a phone. It loads in under 3 seconds and the button is reachable with your thumb.

NOTE

Build on a free host — Carrd, a single Cloudflare Pages file, or your CRM's built-in site. **Speed beats polish.** A plain fast page out-books a slow pretty one.

06

STEP 06 – WIRE CALL + TEXT

WIRE CLICK-TO-CALL AND CLICK-TO-TEXT

On a phone, a tap should dial or open a text — never make a customer copy a number. This is the cheapest conversion win on the whole page.

DO THIS

- > Add tel: and sms: links behind the Call and Text buttons
- > Point both at the number wired to your text-back and front desk
- > Put the same buttons at the top and bottom of the page
- > Add a sticky bottom bar on mobile so the buttons follow the scroll

VERIFY → Tap Call and Text on your phone. The dialer opens with your number, and the text opens a pre-filled message.

NOTE

Pre-fill the text with "Hi, I need a quote for..." so the customer just adds detail and hits send. **Lower the effort, raise the replies.**

PHASE II · THE FRONT DOOR (CONTINUED)

07

STEP 07 – DROP IN BOOKING

DROP THE BOOKING FORM INTO YOUR CALENDAR

The page should book a real slot without a phone call. We connect a simple form or scheduler straight to your calendar so the appointment just appears.

DO THIS

- > Embed Google Calendar appointment slots, Calendly, or your CRM's scheduler
- > Ask only for name, number, address, and the job – nothing else
- > Auto-confirm by text and add the job to your calendar instantly
- > Send the booking into the CRM (Phase IX) so nothing lives in one inbox

VERIFY → Book a test slot as a customer. It lands on your calendar and you get a confirmation text.

NOTE

Every extra form field costs you bookings. **Four fields max.** You can get the rest when you confirm the job.



PHASE III

AI FRONT DESK

PHASE 3 OF 10

This is the lane that stops the bleeding. An AI receptionist that answers in your business's name, qualifies the caller, and books the job onto your calendar – **24/7, while you're on the tools.**

INSTALLS

An AI voice/chat receptionist loaded with your services, pricing rules, and service area, wired to your calendar and tested on live calls.

PHASE III · AI FRONT DESK

08

STEP 08 – STAND UP THE AGENT

STAND UP THE AI RECEPTIONIST IN YOUR NAME

An AI receptionist that answers in your business's name, sounds like your shop, and never sends a caller to voicemail. This is the lane that catches the calls you're losing right now.

DO THIS

- > Pick a voice/chat agent (Goodcall, Rosie, or a custom AI voice agent)
- > Set the greeting in your business name and a tone that fits your trade
- > Choose what it does: answer-and-book, or screen-and-route to you
- > Get a dedicated number, or forward your existing line to it

VERIFY → Call your own number and let it ring through. The AI answers in your business name within two rings.

NOTE

Start with the agent handling **overflow and after-hours** only, then expand to all calls once you trust it. Confidence comes from hearing it work.

09

STEP 09 – LOAD SERVICES + RULES

LOAD YOUR SERVICES, PRICING RULES, AND AREA

The agent is only as good as what it knows. We teach it your services, how you price, and where you'll drive – so it qualifies callers instead of just taking messages.

DO THIS

- > Enter your 3-5 core services and what each typically involves
- > Set pricing rules: flat, "starting at," or "we quote on-site"
- > Define the service area and what happens to out-of-area callers
- > Add your hours, emergency policy, and what jobs you don't take

VERIFY → Ask the agent "how much for [job]?" and "do you cover [town]?" It answers from your rules, not a generic script.

NOTE

Tell it to **never invent a price**. "We'll confirm on-site" wins more jobs than a wrong number that you have to walk back later.

PHASE III · AI FRONT DESK (CONTINUED)

10

STEP 10 – WIRE TO CALENDAR

WIRE IT TO YOUR CALENDAR SO IT BOOKS REAL SLOTS

Answering is half the job – booking is the rest. The agent reads your real availability and drops confirmed appointments straight onto your calendar.

DO THIS

- › Connect the agent to Google/Apple Calendar or your CRM scheduler
- › Set bookable windows, buffer/drive time, and max jobs per day
- › Auto-send a confirmation text with date, time, and address
- › Block the slot instantly so two callers can't grab the same time

VERIFY → Have the agent book a test appointment. It appears on your calendar with the slot blocked and a confirmation sent.

NOTE

Build in **drive-time buffers** from day one. An agent that books back-to-back across town makes you late, and late kills reviews.

11

STEP 11 – TRAIN + LIVE-TEST

TRAIN ON YOUR TOP 10 QUESTIONS, THEN LIVE-TEST

Real callers ask the same handful of questions. We load the answers and then prove it works by calling it until it books cleanly, every time.

DO THIS

- › Write your top 10 questions and the exact answers you'd give
- › Add the three objections you hear most and how you handle them
- › Run 5+ live test calls – easy job, weird job, out-of-area, after-hours
- › Tune the script anywhere it stumbles, then re-test

VERIFY → Run the full test-call set end to end. Every call ends in a booking, a clean message, or a correct hand-off.

NOTE

Save your call recordings. The **real questions customers ask** are the best training data you'll ever get – feed them back in monthly.



PHASE IV

THE CATCH

PHASE 4 OF 10

The second you can't pick up, the lead starts going cold. The Catch makes sure that never happens — an automatic text fires, the lead's info is saved, and a path to book sits right in the thread. **No job ever walks while you're up a ladder.**

INSTALLS

Instant missed-call text-back, automatic lead capture, and an in-thread booking path wired to your real number.

PHASE IV · THE CATCH

12

STEP 12 – TURN ON TEXT-BACK

TURN ON INSTANT MISSED-CALL TEXT-BACK

The single highest-ROI automation in the whole install. The second a call goes unanswered, an automatic text goes out – so the lead never has time to call the next guy.

DO THIS

- > Enable missed-call text-back in your CRM (Jobber, Housecall Pro) or carrier
- > Write the text in your voice: who you are, why you missed it, what to do next
- > Fire it within 5 seconds of the missed call – speed is the whole point
- > Route replies to the front desk or your phone, not a dead inbox

VERIFY → Call your number and decline it. A text arrives within seconds asking what they need.

NOTE

This one automation often **recovers more than the entire build costs** in the first week. If you install nothing else this month, install this.

13

STEP 13 – CAPTURE THE LEAD

CAPTURE AND SAVE THE LEAD AUTOMATICALLY

A caught lead that isn't saved is a lead lost twice. Every missed call and form fill gets logged with name, number, and what they need – automatically.

DO THIS

- > Auto-create a contact from every missed call and form submission
- > Capture name, number, address, and the job in one record
- > Tag the source (call, text, form, Google) so you know what's working
- > Push the lead into the CRM pipeline (Phase IX) as "new"

VERIFY → Miss a test call, then check your contacts. A new lead record exists with the number and a source tag.

NOTE

Tagging the **source** is how you later learn which lane brings the most jobs – and where to spend the next dollar. Don't skip it.

PHASE IV · THE CATCH (CONTINUED)

14

STEP 14 – IN-THREAD BOOKING

PUT A BOOKING PATH INSIDE THE TEXT THREAD

Don't make a caught lead hunt for how to book. The text-back includes a link that drops them straight into your calendar – the catch and the close in one thread.

DO THIS

- > Add your booking link to the text-back message
- > Let them reply in plain words ("tomorrow AM") and have the agent handle it
- > Confirm the booking by text and add it to your calendar
- > If they go quiet, hand off to the Follow-Up Engine (Phase V)

VERIFY → Reply to a text-back from a test phone and book. The slot lands on your calendar without a phone call.

NOTE

Most recovered leads book **by text, not by call**. Meeting them in the thread they're already in is what turns the catch into cash.



PHASE V

FOLLOW-UP ENGINE

PHASE 5 OF 10

Most owners send zero follow-ups – and most money is sitting in the follow-up nobody sent. This lane sends them all, on schedule, until the job is won or closed. **The work you never have time for, done for you.**

INSTALLS

Appointment reminders, a Day 1/2/5/14 estimate sequence, and re-engagement for old leads and past customers.

PHASE V · FOLLOW-UP ENGINE

15

STEP 15 – APPOINTMENT REMINDERS

SET APPOINTMENT REMINDERS TO CUT NO-SHOWS

No-shows are paid time you'll never get back. Automatic reminders before every job cut them sharply and give the customer an easy way to reschedule instead of ghosting.

DO THIS

- › Send a reminder 24 hours and 1 hour before the appointment
- › Include the time, your name, and a one-tap reschedule link
- › Ask for a quick "yes" confirmation the day before
- › Alert yourself when someone reschedules or cancels

VERIFY → Book a test job for tomorrow. Reminder texts fire on schedule with a working reschedule link.

NOTE

A reminder with an easy **reschedule** link beats one without – people who can't make it will move the job instead of vanishing on you.

16

STEP 16 – ESTIMATE SEQUENCE

BUILD THE DAY 1/2/5/14 ESTIMATE SEQUENCE

Most quotes die from silence, not from price. This sequence follows up for you on a schedule that wins jobs without nagging – the work owners almost never do.

DO THIS

- › Day 1: "Sent the quote – any questions?"
- › Day 2: "Want me to hold a time this week?"
- › Day 5: "No rush – I can usually get out within a few days."
- › Day 14: "Closing the loop – keep my number for next time."

VERIFY → Send a test estimate and let it sit. The four messages fire on Day 1, 2, 5, and 14 automatically.

NOTE

The Day-2 and Day-5 touches close the most jobs. **Persistence, not pressure** – every message stays friendly and gives an easy yes. (Full scripts in §Scripts.)

PHASE V · FOLLOW-UP ENGINE (CONTINUED)

17

STEP 17 – RE-ENGAGE OLD LEADS

RE-ENGAGE OLD LEADS AND PAST CUSTOMERS

Your customer list is a goldmine you've never mined. A periodic, useful check-in brings back work from people who already trust you – the cheapest job you'll ever book.

DO THIS

- > Import every past customer and dead lead into one list
- > Schedule a seasonal check-in ("time for your annual...")
- > Offer a reason to call now – a tune-up, an inspection, a small discount
- > Tag anyone who replies and route them to the front desk

VERIFY → Send a test re-engagement to a small group. Replies route to the front desk and land in the pipeline.

NOTE

Reactivating a past customer costs **almost nothing** and converts far better than a cold lead. Run this quarterly and watch the slow weeks fill in.



PHASE VI

QUOTE & CASH

PHASE 6 OF 10

Quotes that go out fast and invoices that chase themselves. This is the difference between getting paid this week and chasing a check next month. **Send it, and let the system collect it.**

INSTALLS

Estimate templates with AI-assisted drafting, one-tap invoicing with payment links, automatic reminders, and deposits at booking.

PHASE VI · QUOTE & CASH

18

STEP 18 – ESTIMATE TEMPLATES

BUILD ESTIMATE TEMPLATES + AI-ASSISTED DRAFTING

A quote you can send from the driveway beats one you write at 11pm. Templates plus an AI draft turn a five-minute job into a thirty-second one.

DO THIS

- > Build templates for your 3-5 most common jobs with standard line items
- > Let AI draft the quote from a few notes, then you set the price
- > Include scope, price, and what's not included so there's no argument later
- > Send as a tap-to-accept estimate, not a PDF they have to print

VERIFY → Draft a test estimate from notes. A clean, branded quote is ready to send in under a minute.

NOTE

Always keep the price in **your** hands – let AI write the words, never the number. A tap-to-accept estimate books faster than anything they have to sign and scan.

19

STEP 19 – ONE-TAP INVOICING

SEND ONE-TAP INVOICES WITH A PAYMENT LINK

The faster the invoice goes out, the faster you get paid. Every invoice carries a payment link so the customer can pay on their phone the moment the job's done.

DO THIS

- > Use Square, Stripe, or your CRM to invoice with a pay link attached
- > Send the invoice the day the job is finished – same-day, on-site if you can
- > Offer card, Apple Pay, and ACH; let them pay without calling you
- > Auto-mark the job paid in the CRM when the money lands

VERIFY → Send a test invoice and pay it from a phone. It's payable in two taps and marks itself paid.

NOTE

Invoicing **on-site, before you leave** is the single biggest lever on how fast you get paid. The link in the customer's hand beats the check in the mail.

PHASE VI · QUOTE & CASH (CONTINUED)

20

STEP 20 – AUTO-REMINDERS

TURN ON AUTOMATIC PAYMENT REMINDERS

Chasing money is the worst part of the job, and the part owners avoid most. Let the system do it – polite, scheduled reminders until the invoice is paid.

DO THIS

- > Schedule reminders at 3, 7, and 14 days past due
- > Keep them friendly and short, with the pay link front and center
- > Stop automatically the moment payment clears
- > Flag anything still unpaid at 30 days for a personal call

VERIFY → Leave a test invoice unpaid. Reminders fire on schedule and stop the instant it's paid.

NOTE

Automated reminders collect **without making you the bad guy**. The system nudges; you stay the trusted tradesperson they call again.

21

STEP 21 – DEPOSITS AT BOOKING

COLLECT DEPOSITS AT BOOKING

A deposit turns a maybe into a commitment and funds the materials before you buy them. For bigger jobs, it's the difference between a booking and a no-show.

DO THIS

- > Set a deposit rule for jobs over a threshold you choose
- > Request the deposit with the booking confirmation link
- > Hold the slot only once the deposit clears
- > Apply it to the final invoice automatically

VERIFY → Book a test job above the threshold. A deposit request goes out and the slot holds only after it's paid.

NOTE

Deposits **filter out tire-kickers** and protect your calendar. Start small – even a modest deposit dramatically cuts no-shows on big jobs.

PHASE VII

REPUTATION MACHINE

PHASE 7 OF 10

Great work that nobody sees online stays invisible. This lane turns every finished job into a review request – and tells you the second anything negative shows up. **Your work, finally visible where buyers look.**

INSTALLS

Automatic review requests after every job, a one-tap Google review link, and reputation monitoring with alerts.

PHASE VII · REPUTATION MACHINE

22

STEP 22 – AUTO REVIEW REQUEST

FIRE A REVIEW REQUEST AFTER EVERY JOB

More reviews means more calls – it's that direct. The moment a job is marked done, an automatic request goes out while the work is fresh and the customer is happy.

DO THIS

- > Trigger the request the moment a job is marked complete
- > Send by text – far higher response than email
- > Personalize it: their name, the job, your thanks
- > Wait a few hours after completion, not the next week

VERIFY → Mark a test job complete. A personalized review request texts out automatically.

NOTE

The **timing** is everything. A request sent the same afternoon, while they're still glad it's fixed, out-pulls one sent days later by a mile. (Script in §Scripts.)

23

STEP 23 – ONE-TAP REVIEW LINK

GIVE A ONE-TAP GOOGLE REVIEW LINK

Every extra step costs you a review. A direct link drops the customer straight onto your Google review box – no searching, no friction, just five stars.

DO THIS

- > Generate your direct Google review link from the Business Profile
- > Put it in the review-request text so it's one tap
- > Send a quick "how-to" only if they ask
- > Thank everyone who leaves one – publicly reply to each

VERIFY → Tap your own review link on a phone. It opens straight to your Google review box, ready to rate.

NOTE

Replying to **every** review – good and bad – signals an active business to Google and to buyers. Set a reminder to reply within 24 hours.

PHASE VII · REPUTATION MACHINE (CONTINUED)

24

STEP 24 – MONITOR + ALERT

MONITOR REPUTATION AND ALERT ON THE NEGATIVE

One unanswered bad review can cost you a month of calls. Monitoring tells you the second something negative lands so you can make it right before it spreads.

DO THIS

- > Set alerts for any new review under 4 stars
- > Watch Google, plus Yelp/Facebook if you're active there
- > Respond to negatives fast, calm, and in public
- > Track your rating and review count monthly against the Phase I baseline

VERIFY → Trigger a test alert (or post a private test). You're notified the same day a low rating appears.

NOTE

A calm, fast reply to a bad review often wins back the customer **and** impresses the next 100 people who read it. Speed beats defensiveness.



PHASE VIII

THE MARKETING LOOP

PHASE 8 OF 10

The corporations have a marketing department running while everyone's home. This is yours – light-touch campaigns that run without you posting every day. **Stay in front of past customers on autopilot.**

INSTALLS

An email/SMS list built from every contact, scheduled seasonal promos and re-engagement, and AI-drafted posts you approve.

PHASE VIII · THE MARKETING LOOP

25

STEP 25 – BUILD THE LIST

BUILD THE EMAIL/SMS LIST FROM EVERY CONTACT

You already met these people — staying in front of them is nearly free. Every lead and customer flows into one list you can reach in a tap, with permission handled right.

DO THIS

- › Pull every contact from the CRM into Brevo or Mailchimp
- › Capture consent so your texts and emails stay compliant
- › Tag by customer type, service, and last job date
- › Keep the list clean — one home for every contact, no duplicates

VERIFY → Add a test contact via a form. It lands in the marketing list, tagged and consented.

NOTE

Owning the **list** is owning the asset. Social accounts can vanish overnight; your contact list is yours and works every time you hit send.

26

STEP 26 – SCHEDULE CAMPAIGNS

SCHEDULE SEASONAL PROMOS + RE-ENGAGEMENT

The work is seasonal, so the outreach should be too. We set the year's campaigns on a calendar once, and they run themselves when the season turns.

DO THIS

- › Map your busy and slow seasons, then plan promos to fill the gaps
- › Schedule the sends in advance — set it once, let it run
- › Tie each promo to a real reason to call now
- › Route every reply to the front desk and into the pipeline

VERIFY → Schedule a test campaign for a future date. It's queued and fires on schedule to the right segment.

NOTE

Aim campaigns at your **slow weeks**. A well-timed tune-up or inspection offer turns the dead season into a booked one.

PHASE VIII · THE MARKETING LOOP (CONTINUED)

27

STEP 27 – AI DRAFTS, YOU APPROVE

LET AI DRAFT THE POSTS AND OFFERS – YOU APPROVE

Marketing dies when it's one more thing to write. AI drafts the posts, emails, and offers from a prompt; you read, tweak, and approve in a minute.

DO THIS

- > Use ChatGPT or Claude to draft posts and offers in your voice
- > Give it your trade, your tone, and the promo – let it write the copy
- > Review and edit every draft before it goes out
- > Keep a swipe file of what worked to reuse next season

VERIFY → Generate a draft promo from a one-line prompt. A usable, on-brand draft is ready to edit and send.

NOTE

AI removes the blank-page problem; **you** stay the final editor. Never auto-publish – a quick read keeps it sounding like you, not a robot.



PHASE IX

THE SECOND BRAIN

PHASE 9 OF 10

Tools without a brain are just toys. The Second Brain is the one place that holds every customer, job, and dollar – and the one number you actually check. **Run the business from a single screen.**

INSTALLS

A simple CRM fed by every prior phase, plus a dashboard built around one number: jobs booked this week.

PHASE IX · THE SECOND BRAIN

28

STEP 28 – STAND UP THE CRM

STAND UP THE SIMPLE CRM

One place for every customer, job, and dollar – not five apps and a notebook. The CRM is the spine the whole system hangs on, kept simple enough that you actually use it.

DO THIS

- > Pick one CRM: Jobber, Housecall Pro, or Workiz
- > Set up contacts, a job pipeline, and basic invoicing
- > Import your existing customers and open jobs
- > Keep the stages few: new → quoted → booked → done → paid

VERIFY → Open the CRM and walk one job through the stages. Every stage updates cleanly with no double entry.

NOTE

The best CRM is the one you'll **actually open**. Simple and used beats powerful and ignored – resist every feature you won't touch this quarter.

29

STEP 29 – FEED IT EVERYTHING

FEED EVERY PHASE INTO ONE DASHBOARD

Each lane we installed should pour into this one screen. When the front desk books, the CRM knows. When the invoice is paid, the dashboard updates – no re-typing.

DO THIS

- > Connect the front desk, text-back, and booking form to the CRM
- > Sync invoices and payments so cash status is always current
- > Pull reviews and lead sources into the same view
- > Make sure a new lead appears without you entering it by hand

VERIFY → Run a lead end-to-end across the lanes. It shows up in the dashboard at every stage automatically.

NOTE

Integration is what turns separate tools into a **system**. The goal: information enters once and shows up everywhere it's needed.

PHASE IX · THE SECOND BRAIN (CONTINUED)

30

STEP 30 – SET YOUR ONE NUMBER

SET THE ONE NUMBER YOU WATCH

A dashboard with fifty metrics gets ignored. We pick the one number that tells you if the week is working – jobs booked – and put it front and center.

DO THIS

- > Make "jobs booked this week" the headline metric
- > Add two backups: revenue collected and reviews gained
- > Glance at it daily; review the trend weekly
- > Compare against the leak you calculated in §Run Your Own Numbers

VERIFY → Open the dashboard cold. The week's booked-jobs number is the first thing you see.

NOTE

If one number is up and to the right, the system is working. **Booked jobs** is that number – everything else is a footnote to it.



PHASE X

BACKUP & OWNERSHIP

PHASE 10 OF 10

The whole system is only as good as who owns it. This is the phase that makes it **yours** – accounts in your name, your data backed up, and a setup documented so anyone can run it. This is the phase others skip and later regret. We don't skip it.

INSTALLS

Every account in your name, automatic backups of contacts and job history, and a documented setup you can hand to anyone.

PHASE X · BACKUP & OWNERSHIP

31

STEP 31 – ACCOUNTS IN YOUR NAME

PUT EVERY ACCOUNT IN YOUR NAME

You should own the system, not rent it from anyone – including us. Every login, domain, and profile is created under your name and your email, and handed to you.

DO THIS

- > Create every account under your business email – not a consultant's
- > Collect all logins into a password manager (1Password, Bitwarden)
- > Confirm you're the owner/admin on Google, the CRM, and payments
- > Store recovery codes and backup email somewhere safe

VERIFY → Sign into each core account yourself. You're listed as owner/admin on every one.

NOTE

If anyone but you holds the keys, you don't own the business – you're renting it. **Owner access on everything** is non-negotiable, and it's yours.

32

STEP 32 – AUTOMATIC BACKUPS

TURN ON AUTOMATIC BACKUPS

A lost phone or a closed account shouldn't erase your customer list. Contacts and job history back up automatically, so the business survives any single failure.

DO THIS

- > Export contacts and job history on a schedule from the CRM
- > Keep a copy in your own cloud (Google Drive / iCloud), not just the app
- > Back up your review links, templates, and automations too
- > Test a restore once so you know it actually works

VERIFY → Open your backup folder. A recent export of contacts and jobs is sitting there.

NOTE

The backup you never test is a backup you don't have. Do **one restore** now so the day you need it isn't the day you find out it's broken.

PHASE X · BACKUP & OWNERSHIP (CONTINUED)

33

STEP 33 – DOCUMENT THE SETUP

DOCUMENT THE SETUP SO ANYONE CAN RUN IT

The system shouldn't live only in your head. A short, plain-English doc – this bible, plus your specifics – means a new hire, a partner, or future-you can run it cold.

DO THIS

- > Write down every tool, login location, and what it does
- > Note the key automations and how to pause or change them
- > Keep this protocol with your specifics filled in alongside it
- > Store it where your team can find it – not a sticky note on the truck

VERIFY → Hand the doc to someone who's never seen the setup. They can find any tool and explain what it does.

NOTE

A documented system is a **sellable, delegable** system. This is what separates a business that runs from a job that runs you.

05

SCRIPTS YOU CAN USE TODAY

Fill the [brackets] and put these to work before the install is even finished.

MISSED-CALL TEXT-BACK

Hey, this is [NAME] with [BUSINESS] – sorry I missed you, I'm on a job. Text me what you need and your address and I'll get right back to you, usually within the hour.

VOICEMAIL GREETING (PUSHES THEM TO TEXT)

You've reached [NAME] at [BUSINESS]. Fastest way to reach me is a text to this number – I'm usually on a job and I'll text right back. Leave your name, address, and what you need.

REVIEW REQUEST (AFTER THE JOB)

Thanks for trusting [BUSINESS] with [THE JOB], [NAME]! If we earned it, a quick Google review helps a small local business more than you know: [REVIEW LINK]. Means a lot.

PHASE V · FOLLOW-UP ENGINE / SCRIPTS

THE FOLLOW-UP SEQUENCE – ESTIMATE SENT, NO REPLY

-
- DAY 1** Hey [NAME], sent over the quote for [JOB] – any questions? Happy to walk through it.
-
- DAY 2** Still happy to help with [JOB] whenever you're ready. Want me to hold a time this week?
-
- DAY 5** No rush, [NAME] – just don't want to leave you hanging. I can usually get out within a few days.
-
- DAY 14** Closing the loop on [JOB]. If you went another way, no worries – keep my number for next time.
-

HOW TO RUN IT

These four touches are the Day 1/2/5/14 sequence from **Phase V, Step 16**. Load them once into your follow-up tool and every estimate gets chased automatically – friendly, never pushy, until the job is won or closed.

06

RUN YOUR OWN NUMBERS

Two minutes with a pen tells you what the leak is costing you.

A	Calls you miss in a week	_____
B	Your average job value (\$)	_____
C	Of missed callers, how many would've booked (try 1 in 3)	_____
=	Weekly leak: $A \times (C \text{ as a share}) \times B$	\$ _____
*52	Yearly leak	\$ _____

Most trade businesses land between **\$45,000 and \$120,000 a year** here. The \$100 install is built to close this first – the text-back and AI front desk catch the callers you're losing today. One recovered job usually covers the whole thing.

PLAIN-ENGLISH GLOSSARY

AI FRONT DESK	Software that answers your phone and books jobs like a receptionist would
TEXT-BACK	An automatic text sent to anyone whose call you miss
AUTOMATION	A task that runs by itself once it's set up – a reminder, a follow-up
CRM	One place that holds all your customers, jobs, and money
LEAD	Anyone who reaches out – a call, text, or form – who might become a job
PIPELINE	Your list of jobs from "just called" to "paid"
INTEGRATION	Two tools wired together so they share info automatically

07

THE VERIFICATION CHECKLIST

The install is signed off when all of this is live and tested – the front office and the operator stack.

PART ONE – FOUNDATION	Base tools, shell, and Git set – <code>brew --version</code> and <code>gh auth status</code> pass
YOUR AI BUILDER	Node, Python, Rust installed · <code>cLaude</code> , <code>opencode</code> , and <code>codex</code> each report a version
FREE, PRIVATE AI	Ollama running · the model library pulled · a model answers with wifi off
THE TRAFFIC COP	OpenClaw daemon healthy · four lanes routing · dashboard at <code>127.0.0.1:18789</code>
RUN IT FROM YOUR PHONE	Telegram bot registered and paired · texting <code>/start</code> returns a reply
AUTOPILOT + BACKUP	n8n workflows firing · workspace mirrored to iCloud · Time Machine + dotfiles backed up
PART TWO – GET FOUND	Google Business Profile claimed, verified, and filled · listings consistent everywhere
THE FRONT DOOR	One-page site live · click-to-call and click-to-text working · booking form drops into the calendar
AI FRONT DESK	Answers in your business name · loaded with services and area · books real slots · passed live test calls
THE CATCH	Missed-call text-back fires in seconds · leads saved and source-tagged · in-thread booking works
FOLLOW-UP & CASH	Day 1/2/5/14 sequence live · one-tap invoicing with pay link · auto reminders · deposits set
REVIEWS & MARKETING	Review request fires after each job · one-tap Google link · list built · promos scheduled
ONE DASHBOARD, OWNED	Every job in one screen · accounts in your name · automatic backups running
CLIENT HANDOFF	This playbook delivered · logins in a password manager · 30-day support window confirmed

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INVESTMENT & TERMS

The commercial side of the install – straight, no fine print games.

INSTALL FEE	\$100, one-time – credited in full toward any future build
PAYMENT DUE	Before the install begins
PAYMENT METHODS	Card, Apple Pay, ACH; others on request
SUPPORT WINDOW	30 days post-install – response within 24h
WHAT'S INCLUDED	Both parts – your AI back office and your AI front office – set up, tested, and documented
OUT OF SCOPE	Third-party subscription fees · paid ad spend · custom software beyond this build
SUBSCRIPTIONS	Any paid tools (scheduler, payments, phone) are billed to you directly by the providers – most of the stack is free
THE LADDER	This install credits forward to the full build and the growth engine – scoped and quoted on your roadmap
REFUND POLICY	Non-refundable once the install session has begun

Trade Owner – Client · Date

Bloo-Collar – AI for the working class · Date

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THE CURATED STACK

Every tool we install or configure – the front office and the operator stack – with the free and cheap options called out. Keep these pages.

GET FOUND & BOOKED

TOOL	WHAT IT DOES	WHERE
GOOGLE BUSINESS PROFILE FREE/CHEAP	Get found locally and take bookings	google.com/business
GOOGLE CALENDAR FREE/CHEAP	Free scheduling your tools can book into	calendar.google.com
CALENDLY · ACUITY	Customer self-booking with reminders	calendly.com

AI FRONT DESK & THE CATCH

TOOL	WHAT IT DOES	WHERE
GOODCALL · ROSIE	AI receptionist that answers and books 24/7	goodcall.com
CUSTOM AI VOICE AGENT	A front desk built to your exact scripts	–
MISSED-CALL TEXT-BACK FREE/CHEAP	Catch the lead you couldn't answer	built into Jobber / House call Pro

RUN THE JOBS – CRM

TOOL	WHAT IT DOES	WHERE
JOBBER	Quoting, scheduling, invoicing for trades	getjobber.com
HOUSECALL PRO	All-in-one home-service CRM	housecallpro.com
WORKIZ	Dispatch + CRM for field service	workiz.com
SERVICETITAN	Enterprise-grade for larger shops	servicetitan.com

THE CURATED STACK (CONTINUED)

QUOTE, INVOICE & GET PAID

TOOL	WHAT IT DOES	WHERE
SQUARE FREE/CHEAP	Invoices + payments, free to start	squareup.com
STRIPE	Payment links and online checkout	stripe.com
QUICKBOOKS	Invoicing tied to your books	quickbooks.intuit.com

REVIEWS & REPUTATION

TOOL	WHAT IT DOES	WHERE
GOOGLE REVIEW LINK FREE/CHEAP	One-tap path to a 5-star review	from your Business Profile
NICEJOB	Automated review requests + monitoring	nicejob.com
PODIUM	Reviews, messaging, and payments	podium.com

STAY IN FRONT – EMAIL / SMS

TOOL	WHAT IT DOES	WHERE
BREVO FREE/CHEAP	Email + SMS campaigns, free tier	brevo.com
MAILCHIMP FREE/CHEAP	Email marketing with a free tier	mailchimp.com

THE CURATED STACK (CONTINUED)

YOUR AI ASSISTANT

TOOL	WHAT IT DOES	WHERE
CHATGPT FREE/CHEAP	Draft quotes, replies, posts, and ads	chatgpt.com
CLAUDE FREE/CHEAP	Drafting and document help, free tier	claude.ai

OWN IT & BACK IT UP

TOOL	WHAT IT DOES	WHERE
1PASSWORD · BITWARDEN	Hold every login in one secure place	bitwarden.com
GOOGLE DRIVE · ICLOUD FREE/CHEAP	Keep your own copy of contacts + jobs	drive.google.com

OPERATOR STACK – AI BRAINS

TOOL	WHAT IT DOES	WHERE
CHATGPT · CLAUDE · GEMINI FREE/CHEAP	Free-tier AI for drafting and the back office	chatgpt.com
CLAUDE CODE · OPENCODE · CODEX	AI that builds and runs the automations with you	claude.com/claude-code
OPENCLAW FREE/CHEAP	Routes the fleet – free at the margin	openclaw.ai
OPENROUTER	One key, route across many models	openrouter.ai

THE CURATED STACK (CONTINUED)

OPERATOR STACK – LOCAL & PRIVATE

TOOL	WHAT IT DOES	WHERE
OLLAMA FREE/CHEAP	Run AI on your own machine – free + offline	ollama.com
LLAMA · QWEN CODER FREE/CHEAP	Strong open models for chat and code	ollama.com/library
LM STUDIO FREE/CHEAP	A friendly app if you skip the terminal	lmstudio.ai

OPERATOR STACK – AUTOMATE & CONTROL

TOOL	WHAT IT DOES	WHERE
N8N FREE/CHEAP	Self-hosted automation, free forever	n8n.io
ZAPIER · MAKE FREE/CHEAP	No-code automation with free tiers	zapier.com
TELEGRAM + BOTFATHER FREE/CHEAP	Run the whole stack from your phone	telegram.org

OPERATOR STACK – HOST & BACK UP

TOOL	WHAT IT DOES	WHERE
RENDER · RAILWAY FREE/CHEAP	Deploy the front-office server, free tiers	render.com
CLOUDFLARE WORKERS FREE/CHEAP	Run code at the edge, generous free tier	workers.cloudflare.com
TIME MACHINE · GITHUB FREE/CHEAP	Full-system + code backup you control	github.com

HOW TO READ THIS

You don't need all of it on day one. The install sequences these so each one pays for the next. **Start with the free rows** – the Google profile, the text-back, the AI assistant, the local model – and the leak starts closing before you spend a dollar.

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THE APPENDIX

Every link referenced in this book, in one place.

GET FOUND & BOOKED	Google Business Profile	google.com/business
GET FOUND & BOOKED	Google Calendar	calendar.google.com
GET FOUND & BOOKED	Calendly · Acuity	calendly.com
AI FRONT DESK & THE CATCH	Goodcall · Rosie	goodcall.com
AI FRONT DESK & THE CATCH	Missed-call text-back	built into Jobber / Housecall Pro
RUN THE JOBS – CRM	Jobber	getjobber.com
RUN THE JOBS – CRM	Housecall Pro	housecallpro.com
RUN THE JOBS – CRM	Workiz	workiz.com
RUN THE JOBS – CRM	ServiceTitan	servicetitan.com
QUOTE, INVOICE & GET PAID	Square	squareup.com
QUOTE, INVOICE & GET PAID	Stripe	stripe.com
QUOTE, INVOICE & GET PAID	QuickBooks	quickbooks.intuit.com
REVIEWS & REPUTATION	NiceJob	nicejob.com
REVIEWS & REPUTATION	Podium	podium.com
STAY IN FRONT – EMAIL / SMS	Brevo	brevo.com
STAY IN FRONT – EMAIL / SMS	Mailchimp	mailchimp.com
YOUR AI ASSISTANT	ChatGPT	chatgpt.com
YOUR AI ASSISTANT	Claude	claude.ai
OWN IT & BACK IT UP	1Password · Bitwarden	bitwarden.com
OWN IT & BACK IT UP	Google Drive · iCloud	drive.google.com
OPERATOR STACK – AI BRAINS	ChatGPT · Claude · Gemini	chatgpt.com
OPERATOR STACK – AI BRAINS	Claude Code · OpenCode · Codex	claude.com/claude-code
OPERATOR STACK – AI BRAINS	OpenClaw	openclaw.ai
OPERATOR STACK – AI BRAINS	OpenRouter	openrouter.ai
OPERATOR STACK – LOCAL & PRIVATE	Ollama	ollama.com
OPERATOR STACK – LOCAL & PRIVATE	Llama · Owen Coder	ollama.com/library

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WHAT YOU WALK AWAY WITH

More jobs, more profit, less paperwork – and a machine that's yours to grow into.

WORKING FOR YOU

- ✓ Your AI back office, running for pennies
- ✓ An AI front desk answering and booking
- ✓ Missed-call text-back catching every lead
- ✓ Follow-ups and reviews firing on autopilot
- ✓ Found on Google, booking jobs
- ✓ Run the whole thing from your phone

IN YOUR HANDS

- ✓ This playbook, every command inside
- ✓ A copy-paste page for all the code
- ✓ Your roadmap for what's next
- ✓ A 30-day support window
- ✓ \$100 credited toward any build
- ✓ Full ownership – it's your machine

MORE JOBS. MORE PROFIT. LESS PAPERWORK.

You own the machine now – start simple, then explore. Let it draft a quote, fire a follow-up, fill a slow week. Every time you lean on it, your competitors fall a little further behind. When you're ready for more, the next rung is waiting: the full build, then the growth engine that keeps your calendar packed. Same trade. Same hands. A business that runs itself.

WEBSITE
bloo-collar.com

START THE INSTALL
bloo-collar.com

EMAIL
[hello@bloo-collar.com]