

DOCUMENT #29

The Blueprint System™ - Technology Series

Service Business Automation

Cut 30% of labor costs while improving service quality

The Automation Revolution

- Save 20+ hours/week on admin tasks
- Reduce errors by 90%
- Scale without adding overhead
- 24/7 customer service capability
- Data-driven decision making

The 7 Core Automations

1. Lead Capture & Qualification

Manual Process: 2 hours/day

Automated Process: 10 minutes/day

Setup:

- Landing page with form (Unbounce)
- Auto-responder sequence (ActiveCampaign)

- Lead scoring based on criteria
- Instant notification to sales
- Calendar booking link for qualified leads

ROI: \$3,000/month in saved labor

2. Scheduling & Dispatch

Tool	Best For	Cost/Month	Time Saved
ServiceTitan	HVAC/Plumbing	\$300/tech	15 hrs/week
Housecall Pro	Home services	\$50/tech	10 hrs/week
Jobber	Field services	\$40/tech	10 hrs/week
Route4Me	Route optimization	\$200	8 hrs/week

Features to automate:

- Customer self-scheduling
- Automatic route optimization
- Text confirmations
- Tech GPS tracking
- Job completion photos

Customer Communication Automation

The Perfect Follow-Up Sequence

Service Completion + 1 hour:

```
SMS: "Hi {FirstName}, thanks for choosing {Company}. Your tech  
{TechName} just completed your service. Reply with any  
questions!"
```

+ 24 hours:

```
Email: Review request with direct links to Google/Yelp Subject:  
"How did we do yesterday?"
```

+ 7 days:

```
SMS: "Quick check - everything still working great from last  
week's service?"
```

+ 30 days:

```
Email: Upsell related service based on purchase history
```

+ 90 days:

```
Email/SMS: Service reminder for recurring maintenance
```

Financial Automation

Money Management on Autopilot

Process	Tool	Setup Time	Monthly Savings
Invoicing	QuickBooks + Zapier	2 hours	\$500
Payment collection	GoCardless/ACH	1 hour	\$1,000
Expense tracking	Expensify	30 mins	\$300
Payroll	Gusto	1 hour	\$400
Financial reporting	Fathom	1 hour	\$600

Total: \$2,800/month saved with 5.5 hours setup

Marketing Automation Sequences

Set It and Forget It Campaigns

New Customer Welcome Series:

1. Day 0: Welcome + what to expect
2. Day 3: How to get most from service
3. Day 7: Other services we offer
4. Day 14: Referral program introduction
5. Day 30: Loyalty program enrollment

Win-Back Campaign:

1. 180 days inactive: "We miss you" + 20% off
2. 210 days: "What went wrong?" survey
3. 240 days: "Last chance" + 30% off
4. 270 days: Move to long-term nurture

Seasonal Campaigns:

- Spring: Maintenance reminders
- Summer: Emergency service prep
- Fall: Winterization services
- Winter: Service agreements push

Operations Automation

Inventory Management

Auto-reorder System:

- Track usage via job completion data
- Set min/max levels by item
- Automatic PO generation
- Vendor EDI integration
- Cost tracking and variance alerts

Tools: Sortly, inFlow, Fishbowl

Savings: 10% on inventory costs, 5 hrs/week labor

HR & Employee Management

People Processes Automated

Onboarding Automation:

- Digital paperwork (BambooHR)
- Training video sequences
- Automatic IT provisioning
- 30/60/90 day check-ins scheduled
- Certification tracking

Time & Attendance:

- Mobile clock in/out with GPS
- Automatic overtime alerts
- PTO request/approval workflow
- Integration with payroll

Performance Management:

- Automated review reminders
- 360 feedback collection
- Goal tracking dashboards
- Recognition programs

Quality Control Automation

Maintain Standards at Scale

Quality Measure	Automation Method	Frequency
Customer satisfaction	Auto SMS survey post-service	Every job

Job completion	Photo requirements in app	Every job
Response time	CRM tracking + alerts	Real-time
First-call resolution	Ticket system analytics	Weekly
Employee compliance	Training completion tracking	Monthly

Building Your Automation Stack

Phase 1 (Month 1-2): Foundation

- CRM implementation (HubSpot/Zoho)
- Basic email automation
- Online scheduling tool
- Investment: \$500, Time: 20 hours
- ROI: \$2,000/month

Phase 2 (Month 3-4): Operations

- Field service management software
- Route optimization
- Mobile workforce app
- Investment: \$2,000, Time: 40 hours
- ROI: \$5,000/month

Phase 3 (Month 5-6): Scale

- Advanced marketing automation
- Financial automation
- HR systems

- Investment: \$1,500, Time: 30 hours
- ROI: \$3,000/month

Total 6-Month ROI: \$10,000/month for \$4,000 investment

AI and Future Automation

Next-Gen Automations Coming

Available Now:

- AI chatbots for 24/7 customer service
- Predictive maintenance scheduling
- Dynamic pricing optimization
- Automated quality scoring from photos
- Voice-to-text job notes

Coming Soon (1-2 years):

- AI dispatch optimization
- Predictive customer churn
- Automated quote generation
- Virtual service advisors
- Drone inspections

Common Automation Mistakes

What NOT to Do

1. **Over-automating too fast:** Start small, prove ROI

2. **Losing personal touch:** Keep human available
3. **Poor data hygiene:** Garbage in = garbage out
4. **No training plan:** Staff must adopt tools
5. **Ignoring integration:** Systems must talk
6. **Set and forget:** Regular optimization needed

Automation ROI Calculator

Your Automation Potential

Current Process	Hours/Week	Cost/Hour	Annual Cost	Automation Savings
Phone answering	40	\$15	\$31,200	70% = \$21,840
Scheduling	20	\$20	\$20,800	80% = \$16,640
Invoicing	15	\$25	\$19,500	90% = \$17,550
Follow-ups	10	\$20	\$10,400	95% = \$9,880
Reporting	8	\$30	\$12,480	85% = \$10,608
TOTAL	93	-	\$94,380	\$76,518

Automation investment needed: ~\$15,000/year

Net savings: \$61,518/year (410% ROI)

Implementation Checklist

Your 90-Day Automation Plan

Days 1-30:

- ☐ Audit current processes
- ☐ Calculate time spent on repetitive tasks
- ☐ Research tools for your industry
- ☐ Start with customer communication
- ☐ Set up basic CRM

Days 31-60:

- ☐ Implement scheduling system
- ☐ Create email templates
- ☐ Set up payment automation
- ☐ Train team on new tools
- ☐ Monitor adoption rates

Days 61-90:

- ☐ Add marketing automation
- ☐ Integrate systems together
- ☐ Create reporting dashboards
- ☐ Calculate actual ROI
- ☐ Plan phase 2 rollout