

FIELD GUIDE

THE STEEL CAPPED 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 artificial intelligence assumes you sit in front of a monitor all day. You do not. You are up in a roof cavity, under a crawlspace, or tracing live switchboards, and the software conversation is happening somewhere far away from the job site.

Here is the straightforward version, written for a business where the owner still gets their hands dirty.

The only rule that matters: Automate the work that repeats, follows a predictable pattern, and does not require your hands. That is it. Everything in this guide builds on that single test. If a task fails it, no tool belongs in your shop.

Notice what that rule excludes. It does not automate your diagnostic skill, your craftsmanship, or your professional judgment call on whether an old system needs replacement. Those are the exact reasons customers hire you. It automates the administrative weight stacked around them.

CHAPTER 1

The five jobs worth automating first

- **Quoting and proposals** — The single highest return in the trades. Turning field notes into a polished quote the same day, rather than at nine o'clock at night, wins jobs you are currently losing purely on speed.
- **Follow-up on open estimates** — Most unsold bids never receive a second touch. Automated, polite follow-up on a reliable schedule is the cheapest revenue available because you've already done the hard part of finding the lead.
- **Review collection requests** — Triggered at the ideal moment, consistently, every single time. Local search algorithms reward this more than almost anything else, yet most competitors handle it haphazardly.
- **Recurring service plan reminders** — Maintenance agreements and seasonal tune-ups renew only when someone prompts the customer. Automating the reminder protects your most dependable profit streams.
- **Local marketing content** — Seasonal promotions, service landing pages, and updates written in your authentic voice for your service region. This replaces costly agency retainers.

CHAPTER 2

What to skip, and why

This is the chapter software vendors will never publish. Most wasted capital in contracting businesses goes to these four traps:

- ✗ **Anything replacing your technical judgment:** Diagnostic tools claiming to instantly identify complex equipment faults. You understand your trade better than the software, and being wrong costs you a costly callback and your hard-earned reputation.
- ✗ **All-in-one platforms you'll only use 10% of:** The temptation of a single sprawling system is massive. What actually happens is an expensive monthly subscription, a painful data migration, and a team using three basic tabs. Start with lightweight tools that integrate with what you already use.
- ✗ **Anything requiring a brand-new daily habit from the field crew:** If a tool demands that your electricians or plumbers log extra data points on every single job, it will be completely abandoned within a month. Adoption is everything, and field crews vote with their behaviour.
- ✗ **Content that sounds like everyone else:** Generic, robotic marketing copy signals you aren't paying attention. If an automated draft doesn't sound like something you would say on the phone, throw it out.

Seven questions to ask before you pay for anything

- 1 What exact hours does this give back to me each week, and what will I do with that time?
- 2 Does this integrate cleanly with the software I already pay for, or does it try to replace my whole stack?
- 3 What does my crew have to do differently? If the answer is anything at all, how will I ensure adoption?
- 4 What happens to my customer data and workflows if I decide to cancel in six months?
- 5 Can I pilot this on a single crew or one specific job type before committing the entire company?
- 6 Who handles the configuration, and what does that cost on top of the base subscription?
- 7 If this tool works exactly as promised, how many extra jobs a month does it need to land to pay for itself?

If a software salesperson cannot answer question seven with a specific number, you aren't talking to a partner. You are talking to a vendor.

A 30-day rollout that won't blow up your week

WEEK 1	Pick one problem, not five Choose your single most expensive leak—usually slow quoting or dropped follow-ups. Write down what it currently costs you in lost jobs per month; that number is your performance scoreboard.
WEEK 2	Set up one workflow Configure one single process properly, matching your pricing structure and your voice. Resist adding a second tool until the first runs for seven days without requiring your attention.
WEEK 3	Run it on real jobs Test the workflow on active work orders and iron out the kinks. Expect the first few automated outputs to need minor edits; that is completely normal and improves rapidly as you correct it.
WEEK 4	Check the scoreboard, then add one Compare your numbers against your Week 1 benchmark. If it moved in the right direction, introduce your next workflow. If it didn't, figure out why before spending another dollar.

WHERE WE COME IN

You don't have to figure this out on your own

Steel Capped AI Consulting does this heavy-duty lifting for trade contractors and local service businesses. We start with a straightforward assessment: we look at how your business actually operates, identify the one or two areas worth automating, and give you an honest answer if the right choice is to change nothing at all. You keep the blueprint either way.

We do not resell software licenses, and we don't take referral commissions to push tech platforms. We get paid to make your shop run smoother—which sometimes means proving that a simple free setup is all you need.

Book a free assessment

Thirty minutes, zero obligation, and absolutely no sales pitch.

Book a Call with Steel Capped AI