



BUSINESS REPORT · AI STRATEGY

AI Strategy Report

Prepared for Birchlane Repairs · two-person repair shop, Ontario

SAMPLE: FICTIONAL CUSTOMER

Birchlane Repairs, its owner Sam and the second tech, Lee, are made up. This is a public example of the C\$79 business report, written from a made-up intake form so you can see exactly what you get. Tool prices are real list prices as checked on the dates shown (Oct 17 to 19, 2026), and they can change.

DATE	REPORT	PRICES CHECKED	PREPARED BY
October 19, 2026	SAMPLE-B-001	Oct 17 to 19, 2026	Kyle, KRBY SI

WHAT'S INSIDE

- Top 3 moves and the whole plan on one page
- Your shop at a glance, from your intake answers
- Where the week goes, ranked
- Six tools: what each is for, exact steps, C\$ per month, setup time and who does it
- A site-visit-to-paid workflow and a mock quote
- Eight prompts you can copy into your phone
- A 30/60/90-day plan, week by week
- Budget, recommended and stretch costs
- Time saved, as clearly labelled estimates
- What to skip, privacy and CASL cautions for Canada, risks, a later build, and next steps



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What's in this report

Sam and Lee, this report is written from your intake answers. It's long because it's meant to be used, not just read: the tool cards, prompts and plan are the parts you'll come back to.

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How to use it

- **Short on time?** Read section 1, then do week 1 of the plan (section 8).
- **Sam:** sections 5, 6 and 7 are yours. The quote workflow is the biggest win.
- **Lee:** the Google Business Profile card and the photo rules (sections 5 and 12).
- **Before paying for anything:** sections 9 and 11.

How to read the tags

V read on the vendor's own pricing page. **S** secondary source (app store, reseller, review site or search snippet), not confirmed on the vendor page. **U** not verified.
ESTIMATE my estimate.

Prices are monthly, in Canadian dollars, before HST. US-dollar prices are converted at the Bank of Canada rate of 2026-10-07 (1 USD = 1.4257 CAD); your card may add about 2.5% for the exchange **S**. Prices are as of October 2026 and can change.



SECTION 1

The short version

Everything that follows explains this page.

You told me your evenings go to quotes: about six a week, each typed out on your phone from site notes, then a "did you see the quote?" text a few days later. Invoices take a couple of Sunday nights a month. Your Google listing hasn't been touched in a year and your website is one page with a phone number. You don't want a robot answering your phone, and you don't want fake photos. Good: none of this needs either.

Your top 3 moves

1

Same-day quotes from a voice note

Sam talks through the job in the truck. An assistant turns it into a clean scope, line items and exclusions in your format. Sam adds every price in a Google Docs quote template and sends a PDF that evening, or before leaving the driveway.

C\$0 to C\$6.99/mo **V** · setup about 2 h **ESTIMATE**

2

A quote-to-paid tracker, then real invoicing

One Google Sheet shows every open quote, with saved day-2 and day-7 follow-ups. By day 45, move invoices off the spreadsheet into Wave (free) or QuickBooks EasyStart, whichever your accountant prefers.

C\$0, or C\$30/mo with QuickBooks **S** · setup about 3.5 h **ESTIMATE**

3

Wake up your free Google listing

Services, service area, hours, ten real job photos, a reply to every one of your 11 reviews, a review-request text after each job, and one photo plus two sentences a week. Lee owns the photos.

C\$0 · setup about 2 h, then 10 min/week **ESTIMATE**

NEW MONTHLY SPEND

C\$6.99

Recommended tier: Google AI Plus **V** + Wave Starter (free). C\$36.99 if your accountant wants QuickBooks. Ex-HST.

SETUP TIME, BOTH OF YOU

About 10 hours

Spread over six weeks, mostly Sam. My estimate.

POSSIBLE TIME BACK

5 to 11 h / month

An estimate from your numbers and my labelled assumptions (**page 14**). Not a promise.

What stays the same

Sam sets every price and reads every quote before it goes. Customers still get Sam or Lee on the phone. Real photos only. Your accountant still does year-end.

What I'd skip

An AI phone receptionist, paid ads, a second assistant, review-software subscriptions, AI-made job photos and anything billed yearly up front. Reasons in **page 15**.



SECTION 2

Your shop at a glance

From your intake form, shortened. If anything here is off, tell me and I'll adjust the plan.

What I asked	What you told me
The business	Birchlane Repairs, home repairs in southwestern Ontario: doors and trim, drywall patches, decks and fences, small carpentry, fixture swaps. Sam owns it; Lee works full time alongside. No office; the truck is the office.
Work volume	About 8 site visits and 6 quotes a week. About 20 invoices a month. Busiest spring to fall.
Where the time goes	<i>"Evenings go to quotes. Each one takes me 25 to 30 minutes because I type it out on my phone from my notes. Then I have to text people to ask if they saw it. Invoices are Sunday nights, about two hours, a couple of times a month."</i>
How quotes go out	Typed as a text message from Sam's phone. No template, no quote numbers.
Invoicing and payment	A Google Sheets template, copied for each invoice and sent as a PDF. Paid by e-transfer or cheque. An accountant does year-end.
Tools you pay for	Two phone plans, and the one-page website on a yearly renewal (Sam isn't sure of the plan). Gmail and Google Sheets on free accounts. No AI tools.
Online presence	A Google Business Profile, untouched for about a year, 11 reviews. A one-page website with the phone number. No social media.
Phone	"A few" missed calls a week when you're on a ladder. You call back at lunch or end of day.
Customer data	Names, addresses, phone numbers, emails, and photos of customers' homes. No card numbers.
Budget and comfort	C\$30 to 100 a month. Sam 3 out of 5 with tech, Lee 2 out of 5. Two Android phones and one older laptop.
90-day goals	Evenings back. Quotes out within a day. Paid faster. Look more established.
Avoid	"No robot answering our phone. Don't want fake photos."
Later build?	Maybe: a way for customers to request a quote with photos on the website.

What I heard

- Your bottleneck is **paperwork after the work**, not finding work. Quotes and follow-ups are where the evenings go.
- A quote typed as a text is hard for a customer to compare, forward or say yes to. **A clean one-page PDF** does a lot of the "look established" goal by itself.
- Follow-ups slip because nothing **reminds you**. That's a tracking problem first.
- Trust matters more than reach for a two-person shop, so real photos and reviews beat ads.

What I'm assuming

- You're registered for HST, or will be. If not, the HST line on the quote template stays off. Your accountant confirms.
- Sam can sign in to the Google Business Profile. If not, recovering access is week 1, task 1.
- Lee won't write quotes; Lee takes photos and sends saved messages.
- Your website host lets you edit the page yourself.



SECTION 3

Where the week goes

Your numbers, laid out as a week, then ranked by how much time each fix could free up against what it costs.

Days, Monday to Friday		On site: jobs plus about 8 site visits a week. Missed calls on ladders, called back at lunch or end of day.
Evenings, Sam		About 6 quotes a week at 25 to 30 min each, typed on the phone. Follow-up texts when remembered.
Sunday nights		Invoices, about 2 hours, a couple of times a month.

#	Task	Your numbers	Fix in this report	New cost	Move
1	Writing quotes	~6 a week, 25 to 30 min each	Voice note, assistant drafts the wording, Sam prices it in a Docs template	C\$0 to 6.99	Move 1
2	Quote follow-ups	~6 a week, easy to forget	Quote tracker + saved day-2 and day-7 messages	C\$0	Move 2
3	Invoicing	~20 a month, ~2 h twice a month	Wave Starter or QuickBooks EasyStart, with online payment	C\$0 to 30	Move 2
4	Being found and trusted	Listing idle a year, 11 reviews	Fill in the profile, real photos, reply to reviews, ask after each job	C\$0	Move 3
5	Missed calls	"A few" a week	Better voicemail greeting, two callback windows, a saved text-back	C\$0	Tool 5
6	Website	One page, no services, no photos	Add services, area, six photos, "how quotes work"; quote form later	C\$0 now	Tool 6

SECTION 4

Your recommended stack

Six pieces. Only one might cost money each month, and the most important three are free.

Job	Tool and plan	C\$ / month	Setup ESTIMATE	Who	Why this one
Assistant	Gemini app (Google): free, then Google AI Plus	C\$0, then 6.99 V	30 min	Sam	Already on your Android phones and tied to the Google account you use. Cheapest paid tier I could confirm on a vendor page.
Quotes	Google Docs quote template	C\$0	90 min	Sam	Turns a text message into a proper one-page quote PDF.
Tracking and follow-ups	Google Sheets tracker + saved messages in Google Keep and Gmail templates	C\$0	60 min	Sam, Lee	One place to see every open quote, and one tap to send a follow-up.
Invoices	Wave Starter, or QuickBooks Online EasyStart	C\$0 V or 30 S	2 to 3 h	Sam	Proper invoices, online payment and records your accountant can use. Pick by the accountant's preference.



Job	Tool and plan	C\$ / month	Setup ESTIMATE	Who	Why this one
Being found	Google Business Profile	C\$0	2 h, then 10 min/wk	Lee, Sam	The listing customers see first when they search for you. Free.
Phone	Your own voicemail + saved text-back	C\$0	20 min	Both	Fixes most missed-call pain with no bot, as you asked.
Website	Small edits to your current page	C\$0 extra	1 to 2 h	Sam	Services, area and photos so the site backs up the quote.
Recommended total		C\$6.99	about 10 h	C\$36.99 if you choose QuickBooks EasyStart. Both before HST.	

Why Gemini and not ChatGPT or Claude?

All three can draft a quote from notes. You already live in Gmail, Google Sheets and Android, so Gemini is one less account and one less app, and Google AI Plus at C\$6.99 ☒ is the cheapest paid step I could confirm on a vendor page. ChatGPT Plus (about C\$25 ☐) is a fine swap if one of you already likes it. Claude Pro (US\$20, about C\$28.51 ☐) is strongest on long documents, which isn't your bottleneck. Pick one and stick with it; switching costs more than any difference between them. KRBY SI runs on Grok Bot, and I've left Grok out because nothing here needs it.

SECTION 5

Tool by tool

What each tool is for, the exact steps, the monthly cost, setup time and who does it.

TOOL 1 · YOUR ONE ASSISTANT · SAM

Gemini app: free first, then Google AI Plus

Free: C\$0 Google AI Plus: C\$6.99/mo ☒ (checked 2026-10-19) Google AI Pro: C\$26.99/mo ☐, not needed now

Setup about 30 min ☐ ESTIMATE

What it's for: turning site notes into quote wording (scope, line items, exclusions), drafting follow-ups and review replies, writing your services list and weekly listing posts. **Not for:** prices, measurements you haven't checked, or anything with a customer's name and address.

Steps: setup

- 1 On Sam's phone, open the Gemini app (or install it from Google Play) and sign in with the Google account the business uses.
- 2 In Gemini's settings, find the activity setting that controls whether your chats are kept and used to improve Google's products, and decide whether to turn it off. Google says some conversations may be read by people to improve the product ☐ (check the current wording). Either way: no customer names, addresses or phone numbers in Gemini.
- 3 Open Google Keep and make a pinned note called "Quote prompt" with Prompt 1 from **page 10**. Make a second pinned note for Prompts 3 and 4.

Steps: the quote from the truck

- 1 Leaving the site, open Gemini, paste the quote prompt, then tap the mic and talk the job through: what's broken, rooms, rough measurements, materials, what's included, what's not, anything you might find once you open it up. Use "the customer", never a name.



- 2 Gemini returns a job summary, line items with no prices, what's included, exclusions and assumptions. Read it for anything it got wrong or made up.
- 3 Copy it into the quote template (Tool 2). Add prices and the customer's details there, in Docs, not in Gemini.
- 4 Upgrade to Google AI Plus only if the free version keeps running out or limits get in the way in weeks 1 to 3.

Watch out: Gemini doesn't know your costs, local material prices, the Ontario Building Code or what's behind the wall. It will sometimes sound sure and be wrong. The price, and the final read, are always Sam's.

TOOL 2 · QUOTES, TRACKING, FOLLOW-UPS · SAM AND LEE

Google Docs quote template, a Sheets tracker and saved messages

New cost C\$0

Uses your free Google account

Setup about 2.5 h total **ESTIMATE**

What it's for: a quote that looks like it came from an established shop, a list that tells you who needs a nudge, and follow-ups that take one tap.

Steps: the quote template (about 90 min, once)

- 1 In Google Docs, make a one-page document with: business name and logo, phone, email, HST number if registered, quote number (BR-001 and up), date, "valid for 30 days", customer name and job address.
- 2 Add sections: Job summary · Line items (item, qty, price) · Subtotal, HST 13% and total · What's included · Not included · Payment terms · How to say yes. See the mock in **page 9**.
- 3 Name it "QUOTE TEMPLATE, do not edit". For each job: File, Make a copy, fill it, then File, Download, PDF.

Steps: the tracker and saved messages (about 60 min, once)

- 1 In Google Sheets, make columns: Quote # · Customer first name · Job · Sent · Amount · Day-2 text · Day-7 text · Status (waiting, won, lost) · Invoice # · Paid.
- 2 Add a colour rule so "waiting" rows turn amber 2 days after Sent and red after 7. Prompt 8 in **page 10** gives you the formula.
- 3 Write the day-2 and day-7 follow-ups, the "on my way" text, the review request and the payment reminder with Prompts 3 and 4. Save them in a pinned Google Keep note on both phones, and as Gmail templates for email (Gmail settings, Advanced, Templates; the location varies **U**).
- 4 Every evening Sam is home, open the tracker: send whatever is amber or red, mark won or lost.

Watch out: the tracker holds first names and amounts, not addresses. Keep it in the business Google account, shared only between Sam and Lee.

TOOL 3 · BEING FOUND · LEE (PHOTOS), SAM (REPLIES)

Google Business Profile

Free

Setup about 2 h, then about 10 min a week **ESTIMATE**

What it's for: your listing in Google Search and Maps, often the first thing a customer sees. One industry study, as reported on X, found Google's AI answers often cite these profiles **U** (I haven't read the study itself), which is one more reason to keep it complete. It's the best free thing on this list.

Steps

- 1 Sign in at business.google.com. If you can't, start Google's access recovery first (it can take days).
- 2 Fill in: services, each with one plain sentence (Prompt 6 drafts them), service area (the towns you drive to), hours, phone and website.



- 3 Lee picks ten real job photos: before and after shots, clean work, no people, no house numbers, no licence plates. Upload them.
- 4 Reply to all 11 existing reviews. Prompt 5 drafts a reply; Sam adds one real detail to each.
- 5 After every finished job, send the review-request text with your profile's review link (Google gives you a share link in the profile).
- 6 Once a week: one photo and two sentences as a post. Lee chooses the photo, Gemini helps with the words (Prompt 7).

Watch out: ask every customer, not just happy ones; don't offer anything in return for a review; never post a review for yourself. Google's rules ban all three.

TOOL 4 · INVOICES AND PAYMENT · SAM · DECIDE BY DAY 45

Wave Starter or QuickBooks Online EasyStart

Wave Starter: C\$0 **V**

QuickBooks EasyStart: C\$30/mo **S**

Card or online payment fees: extra in both **U**

Setup 2 to 3 hours **ESTIMATE**

What it's for: proper invoices with numbers, HST and a pay-online option, a record of who has paid, and books your accountant can work from. AI is not the point here; the software is.

	Keep the spreadsheet	Wave Starter	QuickBooks EasyStart
Cost	C\$0	C\$0 V (Wave Pro C\$25 V)	C\$30/mo S (vendor-page snippet; promo vs list price not confirmed)
Good for	Nothing changes	Simple invoicing and estimates at no cost	Your accountant already works in QuickBooks
Check before choosing	-	Payment fees, reminders and estimates on the free plan U	Whether C\$30 is a promo; payment fees U

Steps

- 1 Ask your accountant one question: "Would you rather I use Wave or QuickBooks?" No preference: Wave Starter.
- 2 Set up your business details, HST number (if registered), invoice numbering and logo. Add customers as you invoice them; don't import everything.
- 3 Turn on the online payment option only after reading its fees. E-transfer stays an option on the invoice.
- 4 Send your next five invoices from it while keeping the spreadsheet as a backup. After one clean month, retire the spreadsheet.



TOOL 5 · PHONE · BOTH

Voicemail and a saved text-back

C\$0

Setup about 20 min **ESTIMATE**

- 1 New greeting: "You've reached Birchlane Repairs, this is Sam. We're probably on a job. Leave your name, number and what needs fixing, and we'll call back today at lunch or after 4:30."
- 2 Save a text-back on both phones: "Sorry we missed you, it's Sam at Birchlane Repairs. We're on a job and will call you back by [time]. If it's easier, text me a photo of what needs fixing."
- 3 Stick to two callback windows: lunch and after 4:30.

A photo by text often answers half the site-visit questions before you go.

TOOL 6 · WEBSITE · SAM

Small edits to the page you have

C\$0 extra

Setup 1 to 2 h **ESTIMATE**

- 1 Add your services list (same words as the Google profile) and the towns you serve.
- 2 Add six real job photos, with captions like "Deck boards replaced".
- 3 Add "How quotes work": we visit, you get a written quote within a day, reply yes to book.
- 4 Link to your Google reviews. Keep name, address and phone identical everywhere.

A quote request form with photo upload is the natural later build (**page 17**).

SECTION 6

From site visit to paid

The whole workflow on one page, with who does each step. Then a mock of the quote it produces, with prices left blank on purpose.

STEP 1 · BOTH**Call or text comes in**

Answer, or voicemail plus the saved text-back. Ask for a photo.

STEP 2 · SAM**Site visit**

Measure, take your own photos, note anything uncertain.

STEP 3 · SAM**Voice note to Gemini**

Quote prompt, then talk it through. No names or addresses.

STEP 4 · SAM**Price it in the template**

Copy the wording into the Docs template. Add prices, HST, customer details.

STEP 5 · SAM**Send the PDF, log it**

Text or email the PDF with a two-line note. Add a row to the tracker.

STEP 6 · SAM OR LEE**Day 2 and day 7**

Amber and red rows get the saved follow-ups. Mark won or lost.

STEP 7 · BOTH**Do the job**

Lee takes before and after photos (no people, no house numbers).

STEP 8 · SAM**Invoice and review ask**

Invoice from Wave or QuickBooks the same day. Send the review-request text.



Google Docs · Quote BR-014 (mock, made-up job, prices blank)

Birchlane Repairs

QUOTE BR-014

Phone · email · HST # _____

Date _____ · valid 30 days

For: [customer name, job address]

Job summary: Replace six soft deck boards and two loose stair treads on the back deck. Re-fasten the railing post at the top of the stairs.

Item	Qty	Price
Remove and replace deck boards, matching size	6	_____
Replace stair treads	2	_____
Re-secure railing post with new fasteners	1	_____
Materials and disposal	-	_____
Subtotal · HST 13% · Total		_____

Included: fasteners, cleanup, disposal. **Not included:** staining, joist repair if found (we'll stop and quote it first).

To book: reply "yes" to the text or email, and we'll send dates.

Text message · sent with the PDF

Hi [first name], it's Sam from Birchlane Repairs. Your quote for the deck is attached. Any questions, text me here. If it looks good, reply "yes" and I'll send you dates.

Google Sheets · Quote tracker (made-up rows)

#	Job	Sent	Status
012	Door rehang	Oct 9	won
013	Drywall patch	Oct 14	waiting, day 7
014	Deck boards	Oct 17	waiting, day 2

Your aim: quotes out the same day, at 12 to 18 minutes instead of 25 to 30. That's a target to test against your own timing, not a measured result **ESTIMATE**

SECTION 7

Ready-to-use prompts

Save these in a pinned Google Keep note on both phones. Replace the [brackets]. Never include a customer's name, address or phone number.

1 · Quote from site notes (the big one)

COPY

You help a two-person home repair company in Ontario write quotes. I'll describe a job from my site notes. Turn it into:

- 1) A two-sentence job summary in plain words a homeowner understands.
- 2) Line items (item and quantity only, NO prices).
- 3) What's included. 4) What's not included. 5) Assumptions and anything that could change the price once we open it up.

Keep it short and specific. Don't invent measurements or materials I didn't mention; if something is missing, list it under "Questions for Sam".

Here are my notes: [talk or paste the job]

Sam adds every price in the Docs template. "Questions for Sam" catches the gaps before the customer sees them.



2 · Tighten the scope wording

COPY

Here is the scope section of a repair quote. Make it clearer for a homeowner, under 120 words, and make sure it says plainly what happens if we find hidden damage (we stop, show the customer, and quote it before doing more work):

[paste the scope, no names or addresses]

Good for jobs with rot, water damage or older houses where surprises are likely.

3 · Day-2 and day-7 follow-ups

COPY

Write two short text messages from Sam at Birchlane Repairs following up on a quote: one 2 days after sending (friendly check that they got it) and one 7 days after (last gentle nudge, easy to say no). Each under 40 words. Warm, not pushy, no exclamation marks. Include [first name] and [job] placeholders.

Save both in Keep and as Gmail templates. Personalise the first few words when you send.

4 · Review request and payment reminder

COPY

Write two short messages from Sam at Birchlane Repairs:

(a) a thank-you after a finished job that asks for an honest Google review, with a [review link] placeholder, under 45 words, with no reward offered;

(b) a polite payment reminder for an invoice that's 10 days past due, with [invoice #] and [amount] placeholders, under 50 words.

Both should end with "Reply STOP if you'd rather not get texts from us."

The opt-out line helps with CASL (see [page 16](#)). Ask every customer, not only the happy ones.

5 · Reply to a Google review

COPY

Draft a reply from Sam to this Google review of our home repair business. Under 60 words, thank them, mention the specific job they described, and sound like a real person, not a company. If the review is negative, stay calm, don't argue, and offer to talk by phone.

Review: [paste the review text only]

Add one real detail from the job by hand before posting.

6 · Services list for the profile and website

COPY

Write a services list for a two-person home repair company in southwestern Ontario. Services: [doors and trim, drywall patches, deck and fence repair, small carpentry, fixture swaps]. For each, one plain sentence (under 20 words) saying what we do. No claims like "best" or "#1", no prices.

Use the same words on Google and the website so they match.

7 · Weekly post from a job photo

COPY

Write a two-sentence Google Business Profile post about this finished job: [what was broken, what we did, which town]. Plain and specific, no hype, no emojis, end with "Call or text for a quote."

Lee picks a real photo. Check it has no people, house numbers or licence plates.



8 · Tracker colour rules

COPY

I have a Google Sheet with columns: Quote #, First name, Job, Sent (date), Amount, Status. Give me step-by-step conditional formatting rules for Google Sheets: turn the row amber when Status is "waiting" and Sent was 2 or more days ago, and red when it was 7 or more days ago.

Describe the columns; don't paste the sheet.

SECTION 8

Your 30/60/90-day plan

One focus per week, sized to fit around real work. If a week gets busy, push the plan back a week; don't skip steps.

Days 1 to 30 · quotes and the listing

When	Do this	Who	Time ESTIMATE	Done when
Week 1	Time your next two quotes the old way (your baseline). Sign in to Google Business Profile (start recovery if needed). Set up Gemini and the Keep notes. New voicemail greeting and text-back.	Sam	1.5 h	Baseline written down. You can edit the profile.
Week 2	Build the Docs quote template. Send the next three quotes with Prompt 1 and the template. Time each one.	Sam	2 h	Three PDF quotes sent, each timed.
Week 3	Build the quote tracker and saved follow-ups (Prompts 3, 4, 8). Lee picks ten job photos.	Sam, Lee	1.5 h	Every open quote is in one sheet.
Week 4	Fill in the profile: services (Prompt 6), area, hours, photos. Reply to all 11 reviews (Prompt 5). Decide: is free Gemini enough, or Google AI Plus?	Lee, Sam	2 h	Profile complete. 11 replies posted.

Days 31 to 60 · get paid faster

When	Do this	Who	Time ESTIMATE	Done when
Week 5	Ask your accountant: Wave or QuickBooks? Set up the one they prefer.	Sam	2 h	Business details, HST and numbering done.
Week 6	Send the next five invoices from the new tool, alongside the spreadsheet. Start the review-request text after every job.	Sam	1 h	Five invoices sent. Review asks going out.
Weeks 7 to 8	First weekly profile post (Prompt 7). Website edits: services, area, photos, how quotes work. Time three quotes again and compare with week 1.	Lee, Sam	2 h	Before and after quote times, yours.



Days 61 to 90 · keep, change or cancel

When	Do this	Who	Time ESTIMATE	Done when
Weeks 9 to 10	Retire the invoice spreadsheet if the month was clean. Look at the tracker: how many quotes were won, lost, or never answered?	Sam	45 min	One invoicing system. A won-and-lost count.
Weeks 11 to 12	Review every tool: anything not used in two weeks gets cancelled. Decide whether a quote request form is worth building now (see section 14).	Sam	30 min	A written keep, change or cancel list.

SECTION 9

What it costs

Monthly, in Canadian dollars, before HST. Your phone plans and website renewal are unchanged in every tier and not counted here.

Tier	What's in it	Per month	Per year	When it makes sense
Budget	Gemini free, Docs quote template, Sheets tracker, saved messages, Google Business Profile, Wave Starter, voicemail and website edits	C\$0	C\$0	Start here. Most of the value is in this tier.
Recommended	Budget, plus Google AI Plus for Sam (C\$6.99 V)	C\$6.99	C\$83.88	Once the free Gemini limits get in the way (week 4 decision).
Recommended with QuickBooks	As above, with QuickBooks Online EasyStart (C\$30 S) instead of Wave	C\$36.99	C\$443.88	If your accountant prefers QuickBooks.
Stretch	Google AI Pro (C\$26.99 V) + Jobber Core billed monthly (US\$49, about C\$69.86 S) for quotes, scheduling and invoicing in one app, instead of Wave	about C\$96.85	about C\$1,162	Only if you add a third person or the tracker gets out of hand. Top of your C\$100 budget.

Jobber Core billed yearly is about US\$29 a month (about C\$41.35 S), but that's a one-year commitment I wouldn't make in the first 90 days. US-dollar prices are converted at 1.4257 and your card may add about 2.5% S. Online payment fees for any invoicing tool are extra and not included U. HST at 13% applies on top where charged; if you're registered, your accountant can tell you what you can claim back.

Where this leaves you: the Budget tier (C\$0) covers all three top moves. The Recommended tier is C\$6.99 a month, about C\$84 a year, against a stated budget of C\$30 to 100. The room left over is on purpose: prove the habits first, then spend.



SECTION 10

Time it could save

Estimates only. They use your numbers from the intake and my assumptions (shaded). Nobody has measured this for your shop.

ESTIMATE · NOT A PROMISE

Task	Your number	My assumption	Could save / week	Could save / month
Writing quotes	6 a week, 25 to 30 min each	Down to 12 to 18 min each with voice note + template	42 to 108 min	about 3.0 to 7.8 h
Quote follow-ups	About 6 a week	2 to 4 min saved each with saved messages and the tracker	12 to 24 min	about 0.9 to 1.7 h
Invoicing	About 2 h, twice a month	25 to 50% faster with invoicing software	-	about 1.0 to 2.0 h
Total, if every assumption holds				about 4.9 to 11.5 h

Arithmetic: quotes $6 \times (25 - 18) = 42$ and $6 \times (30 - 12) = 108$ minutes a week; follow-ups $6 \times 2 = 12$ and $6 \times 4 = 24$. A month is taken as 4.33 weeks. Invoicing $4 \text{ h} \times 25\% = 1 \text{ h}$ and $4 \text{ h} \times 50\% = 2 \text{ h}$. About 10 hours of setup **ESTIMATE** is not subtracted. Your week-1 baseline and the week-8 re-time are how you find the real number.

What the time is worth is your call

If an evening hour is worth your shop rate to you, multiply. If it's worth more because it's family time, that's fair too. I haven't put a dollar figure on it because I'd be guessing.

Things that won't show in the hours

A quote that arrives the same day and looks professional may be easier to say yes to. I can't measure that for you, so I don't count it. Watch your won-and-lost column instead.



SECTION 11

What I'd skip, and why

Every line here is money or time you don't spend. The tools aren't bad; they're wrong for a two-person shop right now.

Skip	Would cost	Why
AI phone receptionist (Goodcall Starter, Rosie)	US\$79 ≈ C\$112.63 V ; US\$49 ≈ C\$69.86 V	You said no robot on the phone, and "a few" missed calls a week is well handled by voicemail and a text-back. Revisit only if busy-season misses climb past about five a week, and then test with 20 real calls first.
Paid ads (Facebook, Instagram, Google)	Varies, see why	Ad systems reportedly need around US\$1,000 a month to learn on Meta S . Your work comes from local word of mouth and search. Fix the free listing and reviews first.
Review software (NiceJob and similar)	US\$75 ≈ C\$106.93 S	Your Google review link and a saved text do the same job for free at your volume.
A second AI assistant	about C\$25 to 29 more	ChatGPT Plus or Claude Pro on top of Gemini would write the same quotes twice.
AI-made job photos or "before and after" images		- You said no fake photos, and you're right. Misleading images can also break advertising rules. Real photos only.
Jobber or other field-service software, for now	US\$49 ≈ C\$69.86 S	Good software, but more than two people need today. Stretch tier only, after 90 days.
Automation tools (Zapier, Make)	Zapier Pro US\$19.99 yearly V	Automate a process after it's steady, not before. Revisit at day 90 if one copy-paste step really bugs you.
Social media schedulers and "AI search" services	US\$99 S ; US\$399+ S	You don't post on social, and managed "AI visibility" services cost more than your whole budget. The Google profile is the free version.
Cold texting or AI calling lists of homeowners		- Consent rules (CASL, and telemarketing rules from the CRTC) make this risky, and it isn't how repair work gets won locally.
Paying yearly up front		- Monthly for the first 90 days, so cancelling is easy.



SECTION 12

Privacy, consent and data in Canada

Plain notes for a two-person shop. Not legal advice; if something here matters to a big decision, ask a lawyer or your accountant.

Customer information

- **PIPEDA likely applies.** Names, addresses, phone numbers and photos of a customer's home are personal information. Collect what you need, keep it in your business accounts, and protect it.
- **Keep customers out of the assistant.** Write "the customer". Names and addresses go in Docs, Sheets and your invoicing tool, never in Gemini.
- **Phones are the risk.** Both phones hold customer details: screen lock, find-my-device on, and two-step sign-in on the Google account.
- **Data may leave Canada.** Google, Wave and QuickBooks may store data outside Canada. That's allowed, but be ready to say so if a customer asks.
- **If something leaks** and there's a real risk of significant harm, PIPEDA requires you to report it to the federal Privacy Commissioner, tell the people affected, and keep a record.

Photos, messages and reviews

- **Ask before posting** a photo of someone's home. A line on the quote ("We may photograph our work for our portfolio; tell us if you'd rather we didn't") makes it easy.
- **Crop out** people, house numbers, licence plates, alarm panels and anything valuable.
- **CASL and texts.** Replying to someone who asked for a quote is fine. Review requests and reminders to past customers generally rely on implied consent from the job, which is time-limited. Identify yourself and include a way to opt out ("Reply STOP"). Never text people who haven't dealt with you.
- **Reviews:** no rewards, no asking only happy customers, no fake reviews (Google's rules, and misleading reviews can break the Competition Act).
- **Payments:** never ask for card numbers by text. Use the invoice's payment link or e-transfer.

When you hire: Ontario employers with 25 or more employees must say in public job postings whether AI is used to screen applicants (since 2026-01-01) . That doesn't apply to you today, but it's worth knowing if you grow.

SECTION 13

Risks and limits

Where this plan could go wrong, and how to catch it early.

Risk	What it looks like	What to do
The assistant gets a detail wrong	A quantity or material you didn't say appears in the draft, or a step is left out.	Read every quote top to bottom. Prompt 1 tells it to list gaps as "Questions for Sam" instead of guessing.
Prices and plans change	A plan costs more, a free limit shrinks, a feature moves tiers.	Prices here were checked Oct 17 to 19, 2026. Check the vendor's page before paying, and stay monthly.
The habit doesn't stick	Busy season arrives and quotes go back to texts.	The template and tracker work without AI. Keep them even if Gemini sits unused.
Too much at once for Lee	Comfort 2 out of 5; new apps feel like extra work.	Lee's part is photos and saved messages only. Sam shows each once, in person.
Scope surprises	Hidden rot or water damage after the quote is accepted.	Keep the "we stop and quote it first" line in every quote (Prompt 2).



Risk	What it looks like	What to do
The estimates are wrong	Time saved is lower than the range.	Your own before and after timing decides. Cancel anything that doesn't earn its place by day 90.
What I can't see	I only know what the intake form told me. I haven't seen your quotes, books or listing.	Tell me what doesn't fit and I'll adjust.
Not professional advice	Tax, HST registration, legal and code questions.	Your accountant for HST and books; a lawyer for contracts beyond routine quotes.

SECTION 14

A later build, and next steps

What could be worth building once the basics are steady, and what to do this week.

Whether a later build is worth it

In your case, the one build I'd consider is a **quote request form on your website**: the customer describes the job, adds two or three photos and their town, and it lands in your email in a consistent format. It could save some site visits for small jobs and gives Prompt 1 better input.

When: not before day 90. The quote template and tracker need to be steady first, or the form just creates more to follow up.

Your fee: on a real business report, the C\$79 can be credited toward a later build with KRBY SI; Kyle confirms the terms if you ask. This sample doesn't include a build, and nothing is set up as part of the report.

Next steps

- ☐ **Tonight (15 min):** time your next quote the old way, and write the number down.
- ☐ **This week:** sign in to Google Business Profile; set up Gemini and the Keep notes; new voicemail greeting.
- ☐ **Next week:** build the quote template and send three quotes with it.
- ☐ **Week 3:** the tracker and saved follow-ups.
- ☐ **Week 5:** ask your accountant "Wave or QuickBooks?"
- ☐ **Day 90:** keep, change or cancel, tool by tool.

Questions? Reply to the email this report came with. If something here doesn't fit how Birchlane works, tell me and I'll adjust it.

SECTION 15

Pricing appendix

Every tool and price in this report, with where it came from and when it was checked. Check the vendor's page before you pay.

Tool and plan	Price noted	Billing	C\$ / month	Src	Checked	Check at
Google AI Plus / Pro (Gemini)	C\$6.99 / C\$26.99	CAD, monthly	6.99 / 26.99	V	2026-10-19	one.google.com
ChatGPT Plus	about C\$25	CAD, monthly	25	S	2026-10-17 (source dated 10-08)	chatgpt.com/pricing
Claude Pro	US\$20 monthly	USD	28.51	V	2026-10-19	claude.com/pricing
Wave Starter / Pro	Free / C\$25	CAD, monthly	0 / 25	V	2026-10-17	waveapps.com



Tool and plan	Price noted	Billing	C\$ / month	Src	Checked	Check at
QuickBooks Online EasyStart	C\$30 (promo vs list not confirmed)	CAD, monthly	30	S	2026-10-17	quickbooks.intuit.com/ca
Jobber Core	US\$49 monthly; US\$29/mo yearly	USD	69.86 / 41.35	S	2026-10-17	getjobber.com
Google Business Profile, Docs, Sheets, Keep, Gmail	Free	-	0	-	-	google.com
Goodcall Starter	US\$79 (100 unique callers)	USD, monthly	112.63	V	2026-10-19	goodcall.com/pricing
Rosie	US\$49 (250 min)	USD, monthly	69.86	V	2026-10-17 (via search)	heyrosie.com/pricing
NiceJob Reviews	US\$75	USD, monthly	106.93	S	2026-10-17	nicejob.com
Zapier Pro	US\$19.99/mo yearly; US\$29.99 monthly	USD	28.50 / 42.76	V	2026-10-19	zapier.com/pricing
Hootsuite	US\$99 per user, yearly	USD	141.14	S	2026-10-17	hootsuite.com
Managed "AI search" services	US\$399 to 600	USD, monthly	569+	S	2026-10-17	-
Meta ads learning budget	around US\$1,000/mo suggested	-	-	S	2026-10-17	facebook.com/business

Exchange rate: Bank of Canada, 2026-10-07, 1 USD = 1.4257 CAD. Prices exclude HST (13% in Ontario where it applies). Rows checked 2026-10-17 were not re-fetched on 2026-10-19; the 2026-10-19 refresh found no list-price changes on the pages it did re-check. Prices are as of October 2026 and can change.

Fine print. This is a sample: Birchlane Repairs, Sam, Lee and every customer and job described are fictional. These are recommendations, not promises of results, and nothing here is legal, tax or financial advice. No affiliate links, and nobody paid to be mentioned. How a KRBY SI report is made: researched and drafted with AI tools, prices checked against vendor pages and other sources on the dates shown, and reviewed by Kyle before a paid report is sent.

