

# Is Your Business Ahead of the Curve?

## Do you deliver quotes and proposals quickly and accurately?

- ☐ I can send a quote within 24 hours
- ☐ My estimates auto-calculate based on labor and material cost
- ☐ I use software to reduce pricing errors and duplicate entries

*If not: Homeowners will pick the pro who can answer them in minutes, not days.*

## Are you using customer data to personalize your sales process?

- ☐ I ask for budget, style, and goals upfront
- ☐ I tailor my pitch based on project type and homeowner preferences
- ☐ I use visuals or mood boards that reflect the customer's unique taste

*AI will expect personalization—so will your clients.*

## Can your clients access project updates without chasing you?

- ☐ I have a client portal or central place for updates
- ☐ Clients know what's happening next, without asking
- ☐ I send automated messages for key milestones

*Frictionless = 5-star reviews and fewer "check-in" calls.*

## Is your communication process fast and modern?

- ☐ I respond to leads within the hour
- ☐ I have templated responses or AI chat tools for FAQs
- ☐ I offer texting or app-based communication

*If you're slow to reply, AI-powered competition won't be.*

## Are payments, contracts, and documents all digital?

- ☐ I use e-signature for contracts
- ☐ Clients can pay online or via app
- ☐ I store and share project documents digitally with my subs and team members

*This isn't a luxury—this is the new minimum expectation.*

### Can your team easily follow the right process on the field?

- ☐ Team members can talk to their phone and record video of their daily logs
- ☐ My team and I use AI to generate change orders, estimates, and invoices live and in minutes
- ☐ I have a simple and repeatable process when new team members join

*AI isn't just for your customer. It's to make your life easier.*

## Final Score

### ✅ 15+ Checks

You're ahead of the curve—just make sure you're telling that story.

### ✅ 8-14 Checks

You're in a solid spot but risk falling behind in key areas.

### ✅ 7-0 Checks

It's time to upgrade your toolkit or lose leads to more tech-savvy competitors.