

THE 10-HOUR AUDIT · SAMPLE REPORT

15.5 hours a month, hiding in plain sight.

Ridgeline Heating & Air — 6 people, residential service & replacement

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This is a sample, not a client report. Ridgeline Heating & Air is a composite of a typical 6-person home-services company — the numbers, stack, and problems are drawn from how these businesses actually run, but Ridgeline is not a real company. I'm showing you this because you shouldn't have to pay \$149 to find out what you're buying. This is the exact format, depth, and honesty you get with your own name on it.

What I was told

These are the five intake questions, and Ridgeline's answers. Ten minutes of typing — or a two-minute voice note — is the entire ask.

1. What does your business do, and how many people work in it?

Residential HVAC — service calls, maintenance plans, and system replacement. Six of us: me (owner), Dana in the office, and four techs. About \$900K last year.

2. Walk me through what happens from a new lead arriving to them paying you.

Phone rings or a form comes in. Dana takes down the info and books it in ServiceTitan. She texts the tech the address. Tech goes out, does the diagnostic, writes up what's needed. If it's a big job he calls it in and Dana builds the estimate and emails it. Then we wait. If they say yes we schedule it. Invoice goes out, then Dana enters it in QuickBooks so my accountant has it.

3. Which repetitive tasks eat the most time each week — roughly how many hours?

Dana says entering the same job into QuickBooks after ServiceTitan is the worst — probably 2 hours a week. She also retypes customer info from the website form. I spend maybe an hour every morning going through voicemails from overnight.

4. What software are you already paying for each month?

ServiceTitan (Starter), QuickBooks Online, Google Workspace, Google Voice for the main number. That's it I think. Maybe \$400-ish a month all in.

5. What's your realistic monthly budget for new tools?

Honestly not much. Under \$100 a month unless it obviously pays for itself.

How work actually moves through Ridgeline

Eight stages. Three of them leak time. Everything else is fine — I'm not going to tell you to rebuild a business that mostly works.

1 · LEAD ARRIVES

Phone (Google Voice), website form, Google Local Services. Roughly **34% of calls land outside 8–5** — evenings, weekends, during storms.

2 · AFTER HOURS

LEAK — 3.5 hrs/mo Voicemail takes it. You triage the queue each morning and call back. By then a share of those callers have booked whoever answered the phone first.

3 · BOOKING

Dana enters the customer into ServiceTitan and assigns a window. Web-form leads get retyped by hand — the form emails her, it doesn't reach ServiceTitan.

4 · DISPATCH

Dana texts the tech the address and job notes. Works fine at four techs. Not a problem worth solving today.

5 · ON SITE

Diagnostic, repair, or a written recommendation. Techs are the product. Nothing here should be automated.

6 · ESTIMATE

LEAK — 2.5 hrs/mo + revenue Roughly 22 estimates go out a month; about 9 never get answered. Follow-up happens when someone remembers. Nobody owns it, so mostly it doesn't happen.

7 · INVOICE

LEAK — 9.5 hrs/mo Every completed job is entered twice — once in ServiceTitan, again in QuickBooks. Dana calls this the worst part of her week, and she's right.

8 · REVIEWS

Ad hoc. Techs ask when they think of it. Worth fixing eventually — it is not in your top three, so it's not in this report.

The pattern: none of your leaks are in the work. They're in the seams *between* steps — where information gets carried from one place to another by a person. That's the good news. Seams are the cheapest thing in a business to fix.

The top 3, with the hours and the dollars

Time is costed at \$26/hr for Dana (loaded, not her wage) and \$65/hr for your own time, which is what an hour of owner attention is worth in a business this size.

1 Stop entering every job twice

ServiceTitan → QuickBooks Online, plus website form → ServiceTitan.

HOURS BACK

9.5 / mo

LABOR COST TODAY

\$247 / mo

NEW SPEND

\$0–12 / mo

What's actually happening: Dana re-keys about 78 invoices a month into QuickBooks, at roughly six minutes each once you count the corrections. Separately, web-form leads arrive as an email she retypes into ServiceTitan — about 2.5 hours a month on its own.

What to do: ServiceTitan ships a native QuickBooks Online integration. ServiceTitan doesn't publish which tiers include it, and their own setup docs say it's a matter of account configuration — so this may already be available to you at no extra cost. **Call your ServiceTitan rep and ask to have the QuickBooks Online sync enabled on your account before you buy anything.** If it turns out to be gated behind a higher tier and they want several hundred dollars a month for it, don't take that deal — build the same sync in **Make.com** (Core plan, \$12/mo for 10,000 credits) in an afternoon.

For the web form, one Make.com scenario moves a submission straight into ServiceTitan as a new customer and booking request. Same subscription, no extra cost.

Do this one first. It's the biggest single block of hours, it's purely mechanical, and no customer ever sees it. If it breaks, nothing embarrassing happens — which is exactly what you want from the first thing you change.

2

Make unanswered estimates follow themselves up

A three-touch sequence on any estimate that goes quiet.

HOURS BACK

2.5 / mo

REVENUE AT STAKE

~\$4,100 / mo

NEW SPEND

\$0

What's actually happening: about 9 of your 22 monthly estimates get no answer. Your average replacement job is in the \$4,000–5,000 range. You are not losing those nine because your price is wrong — you're losing them because the customer got busy and nobody followed up. Homeowners sitting on a \$4,500 decision need three or four contacts, and most contractors make one.

What to do: a sequence that fires automatically on any estimate with no response — text at day 2, email at day 5, text at day 12. Short, plain, no discounting: *"Hey Janet — just making sure that estimate came through and you didn't have questions. Happy to walk you through it. — Ridgeline"*

ServiceTitan's Marketing Pro module does this natively. If it's on your account, this costs you nothing but an hour of setup. If it isn't, **do not buy Marketing Pro for this alone** — the same three touches run out of Make.com on the subscription you're already adding in fix #1.

Conservative math: if this converts just *one* additional job a month out of the nine, that's ~\$4,100 in monthly revenue from an automation that costs you nothing. I'd rather quote you one than promise you three.

3

Answer the after-hours calls you're currently missing

Automatic text-back on every missed call — not an AI receptionist. Yet.

HOURS BACK

3.5 / mo

YOUR TIME COST

\$227 / mo

NEW SPEND

\$19 / mo

What's actually happening: a third of your inbound arrives when nobody's there. It goes to voicemail, and you spend the first hour of four mornings a week working through it. The hours are the smaller loss. The bigger one is that a homeowner with no heat at 9pm calls three companies and books the first one that responds.

What to do — and what not to do: the obvious answer here is an AI voice agent that answers and books. It works, and it runs roughly \$150–300/mo at your call volume once someone is actually building and maintaining it. **I don't think you should start there.** It's customer-facing, it takes real setup, and if it mishandles a call you've spent trust you can't get back.

Start with the version that captures most of the value for \$19: **Quo** (formerly OpenPhone — \$19/user/mo month-to-month, \$15 on annual billing; the auto-reply feature is on the entry Starter tier, you don't need to buy up) replaces Google Voice and sends an automatic text the instant a call is missed — *"Sorry we missed you — this is Ridgeline. Text back what's going on and we'll get you on the schedule first thing."* The caller now has a thread open with you instead of a voicemail into silence. Your morning triage becomes reading texts instead of transcribing voicemails.

Revisit the AI agent in 90 days, once you can see from your own text threads how many after-hours calls are genuine emergencies versus next-morning bookings. Then you'll be buying it with evidence instead of a hunch.

The total

FIX	HOURS BACK / MO	COST OF THAT TIME	NEW TOOL SPEND
1 · Kill the double entry	9.5	\$247	\$0–12
2 · Estimate follow-up sequence	2.5	\$65	\$0
3 · Missed-call text-back	3.5	\$227	\$19
Total	15.5 hrs	\$539 / mo	\$19–31 / mo

You are spending roughly **\$539 a month in labor** — about \$6,470 a year — on work that software does for **\$19 to \$31 a month**. That's before the revenue in fix #2, which I've left out of the total on purpose, because I'd rather the number I hand you be one you can verify against your own payroll than one that depends on a forecast.

The order to do them in

WHEN	DO THIS	TIME IT TAKES YOU
This week	Call your ServiceTitan rep. Two questions: is QuickBooks Online sync available on my account, and is Marketing Pro. Get answers before spending anything.	15 min
Week 1	Turn on the QuickBooks sync (or build it in Make.com). Run it in parallel with Dana's manual entry for one week and compare.	2–3 hrs
Week 2	Web form → ServiceTitan. Same Make.com account.	1 hr
Week 3	Build the three-touch estimate sequence. Write the messages yourself in your own voice — this is the one place the wording matters.	1–2 hrs
Week 4	Port the main number to Quo, set the missed-call auto-text. Do it on a Monday, not a Friday.	1–2 hrs

One at a time. The most common way this goes wrong is doing all three in the same week, having something break, and not knowing which change caused it. Four weeks, one change each, verify before

What I'd skip

- **Don't replace ServiceTitan.** It's expensive and you're underusing it, but the answer to underusing a tool is not buying a different tool. Turn on what you're paying for.
- **Don't buy a reputation platform yet.** The \$300–400/mo review products are real, and they're not your bottleneck. Ask your techs to send one text at the end of each job first, and see how far free gets you.
- **Don't buy the AI receptionist this month.** See fix #3. The \$19 version captures most of it and tells you whether the \$200 version is worth it.
- **Don't automate dispatch.** At four techs, Dana texting an address is faster than any system you'd buy. Revisit at eight.

A note on the pricing above. Software vendors change prices. Every figure here was accurate when this report was written, and I list them so you can check them — not so you'll take my word for it. If a price has moved by the time you're reading this, the recommendation still holds; the arithmetic just shifts a few dollars.

Skyler King · Gemina Automation LLC. I'm a solo operator, not an agency — you're talking to the person doing the work. I'll tell you when a free tool beats a paid one, because a report that recommends five subscriptions isn't advice, it's a shopping list. Two of the three fixes above cost this company nothing.

Your version of this report comes with an 8-minute video of me walking through it on screen, so you can watch it at 9pm instead of scheduling a call. If I can't find you at least 10 hours a month, you get a full refund and you keep the report.