aiPartners

AI READINESS ASSESSMENT

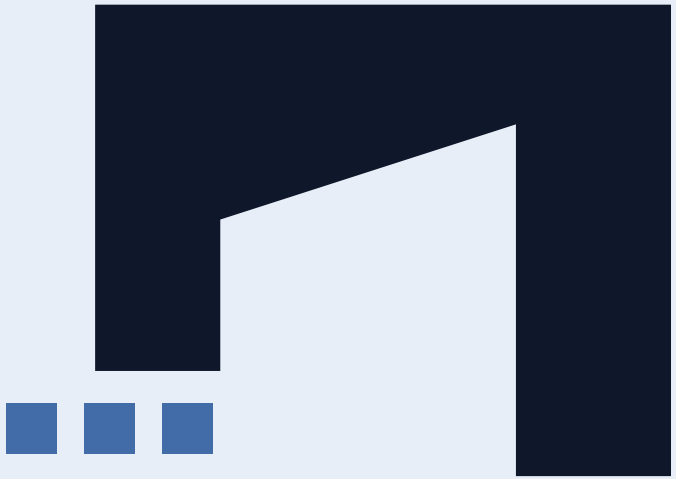
Project operations

Prepared for

[redacted]

Assessment date

[redacted]



Executive Summary

[redacted], you've built a real business over [redacted] — [redacted] in revenue, [redacted], a team of [redacted]. The foundation is solid. What's holding [redacted] back isn't ambition. It's three operational gaps that are costing you money you've already earned and time you can't get back.

OUTCOME

With four targeted tools and four days of setup, [redacted]'s PMs stop writing RFIs from scratch, [redacted]'s takeoffs stop being a bottleneck, and the change order paper trail that's been losing you [redacted] a year finally exists. That reclaims 25–35 hours a week — and none of the three major builds are counted in that number.

CRITICAL PAIN POINTS

- [redacted] in change order revenue written off — last 12 months alone
- No real-time job cost visibility — losses show up at project end
- Estimating takes 40–60 hrs per bid — [redacted] is the single point of failure
- PMs spend 12–16 hrs/week writing documents AI could draft in minutes
- [redacted] in 90-day+ AR — [redacted] making collections calls himself
- [redacted] Procore subscription running at ~40% compliance

25–35

HRS / WEEK RECLAIMED

TOOL STACK

Procore — [redacted], used for filing
Buildertrend — not in use
Fieldwire — abandoned after 6 months
QuickBooks Time — inconsistent use

PRIMARY FOCUS

Efficiency + Revenue

Impact – Effort Matrix

QUICK WINS

PandaDoc Change Order Workflow
Knowify Job Cost Dashboard
Togal.ai Takeoff Automation
ChatGPT Teams PM Doc Library
Procore 4 Non-Negotiables Sprint

MAJOR PROJECTS

AR Escalation Engine
Bid Qualification Filter
Voice-to-Daily-Log Pipeline

← LOW EFFORT

HIGH EFFORT →

IGNORE

FILL LATER

Playbook Documentation
Succession Planning

Recommended Solutions

01 Change Order Paper Trail

PandaDoc

You approve scope changes verbally in the field to keep work moving — and six weeks later that conversation is a disputed invoice. PandaDoc lets your PMs create a signed change order from their phone in under two minutes. Client signs digitally before work starts. Timestamped PDF, no ambiguity.

Complexity: Low · Cost: $49/mo · Setup: ~1 hr · Saves: est. 1–2 hrs/week

02 Real-Time Job Cost Visibility

Knowify

You pull a mid-project cost report and it's missing two weeks of materials and half the labor — directionally useful but not precise enough to act on. Knowify syncs in real time with QuickBooks, captures mobile time entry from the field, and gives [redacted] a live P&L per project without manual re-coding.

Complexity: Low · Cost: $199/mo · Setup: ~3 hrs · Saves: est. 3–4 hrs/week

03 AI Quantity Takeoffs

Togal.ai

[redacted] sits with PDF drawings measuring wall lengths by hand — 40 to 60 hours per estimate, and when two bids overlap, quality suffers on the one he's rushing. Togal.ai reads the drawing set and auto-generates quantities with up to 98% accuracy. [redacted] reviews instead of counts. Start with the 14-day free trial on a live bid set.

Complexity: Low · Cost: $199/mo · Setup: ~45 min · Saves: est. 10–15 hrs/week

04 PM Documentation Drafting

ChatGPT Teams

Your four PMs spend 6–8 hours a week writing RFIs, submittal cover letters, change order narratives, and client updates from scratch — that's 12–16 hours of boilerplate every week. ChatGPT Teams gives all four PMs a shared workspace with [redacted]-specific templates. Describe the issue, AI drafts the document.

Complexity: Low · Cost: $100/mo (4 users) · Setup: ~45 min · Saves: est. 12–14 hrs/week

Quick Wins Plan

Day 1

Sign up at pandadoc.com
Business plan — $49/mo

Create [redacted] change order template (use PandaDoc's built-in CO template as base)

Add all 4 PMs as users

Send a test CO to an internal email — confirm signature flow works

[redacted] owns this. Under 1 hour.

PandaDoc

Day 2

Sign up at knowify.com
Advanced plan — ~$199/mo

Connect QuickBooks Online (guided 2-way sync — 15 min)

Import [redacted] as job codes

Send [redacted] a mobile time-entry test with one crew member

[redacted] owns setup. [redacted] on call if needed.

Knowify

Day 3

Start 14-day free trial at togal.ai
No credit card required

Upload a current bid set — real [redacted] PDF drawings

Run the AI takeoff with [redacted]

Compare AI output vs manual count on one section

[redacted] decides: accurate enough to use? Trial answers the question.

Togal.ai

Day 4

Sign up at chatgpt.com/teams
$25/user × 4 PMs = $100/mo

Create 5 core prompt templates:
RFI · Submittal Cover · CO Narrative · Client Update · Collections

Invite [redacted] first — he's the champion

Run one live test: PM describes an open RFI, AI drafts it.

ChatGPT Teams

What Comes After

01

AR Escalation Engine

An automated collections ladder that monitors QuickBooks for overdue invoices and runs a tiered sequence — auto-email at Day 3, firm follow-up at Day 15, [redacted]-call flag at Day 30 — so [redacted] doesn't see it until Day 45 and it's a genuine relationship issue, not an admin failure. Built on Make.com using an existing QuickBooks + Gmail blueprint. [redacted] described this process word-for-word himself on the discovery call.

02

Bid Qualification Filter

A scored intake form built around [redacted]'s go/no-go criteria — project type, size, client profile, location, contract terms, risk — that routes low-score opportunities to a standard decline and only surfaces high-score bids to [redacted]. Eliminates 4–5 hours/week of bid-document reading. Requires a 90-minute extraction session with [redacted]. [redacted] has been asking for this for three years.

03

Voice-to-Daily-Log Pipeline

A voice-first daily log system for supers who won't type. [redacted] sends a WhatsApp voice note at end of day; the system transcribes it, structures it into Procore's daily log format, and routes it to the PM for one-click approval. [redacted] talks all day — now he's documenting. Solves the legal liability [redacted] has been trying to fix for three years.

Estimated impact

~1,300% ROI

~25 hrs

/ week

WEEKLY TIME RETURNED

~$547/mo

TOTAL TOOL INVESTMENT

~$6,953

/ month

EST. MONTHLY VALUE

TOOL	REPLACES	SETUP	SAVES/WEEK	MONTHLY COST
PandaDoc	The [redacted] in disputed change orders [redacted] stops fighting to collect	~1 hr	est. 1–2 hrs/wk	$49
Knowify	Mid-project financial blindness — the loss you don't see until it's too late to fix	~3 hrs	est. 3–4 hrs/wk	$199
Togal.ai	[redacted] counting linear feet by hand — 40–60 hrs of manual takeoff per bid	~45 min	est. 10–15 hrs/wk	$199
ChatGPT Teams	12–16 hrs/week of PM time drafting boilerplate from scratch, every week	~45 min	est. 12–14 hrs/wk	$100
TOTAL		~5–6 hrs	~25–35 hrs/week	~$547/mo

ROI = (Monthly time value − tool cost) ÷ tool cost · Assumes $75/hr blended rate (unconfirmed — confirm with [redacted]) · PandaDoc revenue impact shown in Replaces column,

Next Steps

01

Start the 4-day setup sprint this week

Day 1 is PandaDoc — under an hour, [redacted] or [redacted] can do it without [redacted]. The four tools collectively reclaim 25–35 hours a week across your team. The sprint runs in parallel with active projects. You don't stop work to set this up. Togal.ai runs on a 14-day free trial — [redacted] decides on Day 3 whether it earns a paid seat.

02

Schedule a Phase 2 scoping call

The AR Escalation Engine, Bid Qualification Filter, and Voice-to-Daily-Log Pipeline are built by [redacted] — not by [redacted]. One scoping call to define requirements. We build, configure, and hand you a running system. These are the automations that get [redacted] to [redacted] and add back the valuation premium [redacted] said you were leaving on the table.