The Contractor's AI Toolkit

50+ Copy-Paste AI Prompts to Run Your Business Faster

01 Estimates & Proposals
02 Client Communication
03 Project Management
04 Marketing & Lead Generation
05 Financial & Admin
+ Bonus SOP Templates

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behindtheproduct.pro

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Every prompt starts with your personalized Context Block — set it up once, use it everywhere.

GS

Getting Started with Your AI Toolkit

Welcome to The Contractor's AI Toolkit. This guide will have you saving hours of admin time within the next 10 minutes.

You don't need to be a tech expert. If you can copy, paste, and fill in a few blanks — you can use every prompt in this toolkit.

Step 1: Choose Your AI Tool

You only need ONE of these. All are free to start:

Tool	Cost	Best For	How to Access
ChatGPT (by OpenAI)	Free tier available, Plus is $20/mo	Most popular, great all-around	chat.openai.com
Claude (by Anthropic)	Free tier available, Pro is $20/mo	Excellent for longer documents and detailed writing	claude.ai
Google Gemini	Free with Google account	Good if you already use Google Workspace	gemini.google.com

Our recommendation: Start with the free version of ChatGPT or Claude. Either one works great with every prompt in this toolkit. Upgrade to a paid plan only after you've confirmed it's saving you time.

Step 2: Set Up Your Context Block

This is the single most important thing in this entire toolkit.

The problem: When you ask AI to write an estimate or email, it doesn't know anything about YOUR business. So you get generic, useless output.

The solution: Your Context Block is a short paragraph about your business that you paste BEFORE any prompt. It takes 2 minutes to set up once, and it makes every single prompt in this toolkit produce personalized, ready-to-use results.

Create Your Context Block

Copy the template below and fill in your details. Save it somewhere easy to access — a note on your phone, a text file on your desktop, or pinned in your AI chat.

```
ABOUT MY BUSINESS:
I run [YOUR COMPANY NAME], a [YOUR TRADE — e.g., general contracting, plumbing, electrical, roofing, painting, HVAC] company based in [CITY, STATE]. We primarily handle [RESIDENTIAL / COMMERCIAL / BOTH] projects. Our typical project ranges from $[MINIMUM] to $[MAXIMUM]. Our team currently has [NUMBER] employees/crew members. We've been in business for [NUMBER] years. Our main services include [LIST YOUR TOP 3-5 SERVICES]. Our ideal customer is [DESCRIBE — e.g., homeowners in suburban neighborhoods, property managers, commercial building owners]. We differentiate ourselves by [WHAT MAKES YOU DIFFERENT — e.g., attention to detail, 24-hour response time, specialized expertise in historic renovations].
```

Example: Filled-In Context Block

```
ABOUT MY BUSINESS:
I run Solid Ground Contracting, a general contracting company based in Austin, TX. We primarily handle residential projects. Our typical project ranges from $15,000 to $150,000. Our team currently has 8 employees. We've been in business for 6 years. Our main services include kitchen remodels, bathroom renovations, room additions, and deck builds. Our ideal customer is homeowners in suburban neighborhoods of Austin looking to upgrade their living spaces. We differentiate ourselves by transparent pricing, weekly photo updates to clients, and a 2-year workmanship warranty.
```

Step 3: How to Use Any Prompt in This Toolkit

Every prompt in this toolkit follows the same simple process:

1. **Open your AI tool** (ChatGPT, Claude, or Gemini)
2. **Paste your Context Block** at the top of the message
3. **Paste the prompt** below your Context Block
4. **Fill in the [BRACKETS]** with your specific details
5. **Hit Enter** and review the output
6. **Edit as needed** — the AI gets you 80-90% of the way there. Add your personal touch to make it yours.

Pro Tips

- **Start a new chat for each task.** Don't try to do estimates and emails in the same conversation — the AI works better with a fresh start for each job.
- **Be specific in the brackets.** The more detail you give, the better the output. "Kitchen remodel" is okay. "Full kitchen remodel including cabinet replacement, quartz countertops, new tile backsplash, and lighting upgrade in a 1960s ranch home" is much better.
- **Save your best outputs.** When the AI nails it, save that response as a template. Over time, you'll build a library of your own customized versions.
- **It's a draft, not a final product.** Always review before sending to a client. The AI doesn't know your specific pricing, timeline commitments, or relationship with the customer.

Step 4: Quick Win — Try It Right Now

Let's get you a quick win in the next 2 minutes. Paste this into your AI tool:

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a professional follow-up email to a potential client I met with yesterday. We discussed a [TYPE OF PROJECT] at their home. The estimated budget we talked about was around $[AMOUNT]. I want to thank them for their time, recap what we discussed, and let them know I'll have a detailed estimate to them within [TIMEFRAME]. Keep it friendly and professional — not salesy. End with a clear next step.
```

That's it. You just saved 15-20 minutes of staring at a blank email. Now imagine doing that 10 times a day.

How This Toolkit is Organized

Section	What It Covers	When to Use It
01 — Estimates & Proposals	Creating professional estimates, proposals, and change orders	When you need to quote a job or document scope changes
02 — Client Communication	Emails for every stage of the client relationship	Follow-ups, updates, payment reminders, review requests
03 — Project Management	Planning, scheduling, and team coordination	Crew briefings, punch lists, subcontractor agreements
04 — Marketing & Lead Gen	Getting found online and attracting new business	Google Business, social media, website copy, referrals
05 — Financial & Admin	Business operations and office management	Expenses, hiring, business plans, onboarding
Bonus — SOP Templates	Standard operating procedures for your company	Systematize your intake, kickoff, and closeout processes

About the Creator

This toolkit was built by **Chris Painter**, CEO of Behind The Product Consulting. Chris is an MIT-educated product executive with 20+ years of experience shipping products at Amazon (he led the original FireTV and FireTV Stick), GoPro, T-Mobile, and CNH Industrial — with 30+ patents to his name.

He built this toolkit because the same product thinking that launched some of the world's best-known tech products can help contractors run their businesses more efficiently. Every prompt is designed as a structured workflow — not just a generic "ask AI to do something" — so you get consistent, professional results every time.

Learn more at **behindtheproduct.pro**

Ready? Let's dive into Section 01 — Estimates & Proposals.

01 Estimates & Proposals

Winning work starts with a professional estimate. The prompts in this section help you turn rough

1 Generate a Detailed Project Estimate from a Scope Description

Use this when you've scoped out a job and need to turn your mental notes into a structured, line-item estimate you can hand to a client.

```
[PASTE YOUR CONTEXT BLOCK HERE]

I need you to create a detailed, professional project estimate based on the following scope description. Format it as a document I can send directly to a client. Include a header with my company info, a project summary, a line-item breakdown organized by phase or trade category, and a total at the bottom.

PROJECT DETAILS:
- Client name: [CLIENT NAME]
- Project address: [ADDRESS]
- Project type: [e.g., Full kitchen remodel, bathroom renovation, deck build, roof replacement]
- Scope description: [DESCRIBE EVERYTHING INCLUDED — e.g., "Demo existing kitchen cabinets and countertops. Install new shaker-style cabinets (approximately 20 linear feet upper and lower), quartz countertops, subway tile backsplash, new sink and faucet, under-cabinet LED lighting. Flooring is NOT included."]
- Estimated total budget range: $[LOW END] – $[HIGH END]
- Estimated project duration: [e.g., 3-4 weeks]
- Any specific materials or brands the client requested: [LIST OR "None specified"]
- Permits required: [YES/NO — specify which if known]
- Special conditions or notes: [e.g., "Homeowner will be living in the house during renovation," "Access is through a narrow hallway," "HOA approval needed"]

Format the estimate with these sections:
1. Project Overview (2-3 sentence summary)
2. Scope of Work (bullet points of what IS and IS NOT included)
3. Cost Breakdown (line items grouped by category with individual costs)
4. Project Timeline (start date, key milestones, estimated completion)
5. Terms & Conditions (payment schedule, warranty info, change order policy)
6. Acceptance Line (signature/date fields)

Use professional but plain language — no jargon the homeowner won't understand. Where I've given a budget range, create realistic line items that add up to the midpoint of that range.
```

What You'll Get

A complete, ready-to-send estimate document with line-item pricing, scope details, timeline, and terms — formatted professionally and written in language your client will actually understand.

2 Convert Rough Site Visit Notes into a Professional Proposal

Use this when you just got back from a site visit, typed some quick notes into your phone, and now need to turn that into a proposal that wins the job.

```
[PASTE YOUR CONTEXT BLOCK HERE]

I just got back from a site visit and I need you to turn my rough notes into a polished, professional proposal I can send to the client. Clean up my language, organize the information logically, and make it look like it came from an established company — not scribbled on the back of a receipt.

MY RAW SITE VISIT NOTES:
[PASTE YOUR NOTES EXACTLY AS THEY ARE — typos, shorthand, and all. For example: "met w/ sarah johnson, wants master bath redone. Tub is old cast iron — remove & replace w/ walk-in shower. Tile floor cracked in multiple spots. Vanity is 1990s oak, wants double vanity w/ stone top. Plumbing looks old but functional, might need to update supply lines. Small window above tub — she wants it kept. Room is approx 8x10. Budget seemed like 25-35k range. She mentioned wanting it done before thanksgiving."]

CLIENT NAME: [CLIENT NAME]
PROJECT ADDRESS: [ADDRESS]
APPROXIMATE BUDGET DISCUSSED: $[AMOUNT OR RANGE]
TARGET START DATE: [DATE OR TIMEFRAME]
TARGET COMPLETION DATE: [DATE OR "ASAP" OR TIMEFRAME]

Turn this into a professional proposal with:
1. A personalized opening paragraph thanking them for the meeting and summarizing their vision
2. Detailed scope of work (organized by category, written in complete sentences)
3. What's included and what's excluded (be explicit to prevent misunderstandings)
4. Estimated investment range
5. Proposed timeline
6. Why they should choose us (reference my company's differentiators from my context block)
7. Next steps to move forward

Tone: Confident, professional, and warm — like a contractor who really listened and has a clear plan.
```

What You'll Get

A polished, multi-section proposal that transforms your rough notes into a document that builds client confidence and clearly communicates what you'll deliver, when, and for how much.

3 Write a Change Order Explanation for a Client

Use this when something unexpected comes up mid-project and you need to explain the additional cost or timeline change to your client in a way that's clear, honest, and doesn't damage trust.

```
[PASTE YOUR CONTEXT BLOCK HERE]

I need to send a change order to my client and I want to explain it in a way that's profe
  ssional, transparent, and maintains their trust. Write this as a message I can send via
   email or print out for their signature.

CHANGE ORDER DETAILS:
- Client name: [CLIENT NAME]
- Project: [PROJECT DESCRIPTION — e.g., "Master bathroom renovation at 123 Oak Street"]
- Original contract amount: $[AMOUNT]
- What we discovered or what changed: [EXPLAIN THE ISSUE — e.g., "When we removed the old
   tile floor, we found significant water damage to the subfloor and floor joists beneath
   the toilet area. Approximately 30 square feet of subfloor needs to be replaced and two
   floor joists need to be sistered for structural integrity."]
- Additional cost: $[AMOUNT]
- Additional time needed: [e.g., "3-4 additional working days"]
- Who discovered it and when: [e.g., "Our lead carpenter found this on Tuesday morning du
  ring demo day 2"]
- Is this work required or optional: [REQUIRED FOR SAFETY/CODE / STRONGLY RECOMMENDED / O
  PTIONAL UPGRADE]
- What happens if we DON'T do this work: [e.g., "New tile floor would be installed over c
  ompromised subfloor, likely leading to cracking and potential mold growth within 1-2 ye
  ars"]

Write the change order explanation with:
1. A clear, non-alarming opening that explains what we found
2. Plain-language description of the issue (assume the client has zero construction knowl
  edge)
3. What we recommend and why
4. Itemized cost of the additional work
5. Impact on timeline
6. What happens if they choose not to do the work (when applicable)
7. A reassuring close that reaffirms our commitment to the project
8. Signature/approval line

Tone: Honest, calm, and professional. This should feel like a trusted advisor giving them
```

What You'll Get

A clear, trust-building change order document that explains the unexpected issue in plain language, justifies the additional cost, and gives the client everything they need to approve the work confidently.

4 Create a Material Cost Breakdown Summary

Use this when a client wants to understand where their money is going on materials, or when you need to document material selections and costs for your own records and purchasing.

```
[PASTE YOUR CONTEXT BLOCK HERE]

I need a clean, organized material cost breakdown that I can share with my client or use
  for internal purchasing. Create a professional summary document from the details below.

PROJECT: [PROJECT DESCRIPTION — e.g., "Kitchen remodel for the Martinez residence"]
CLIENT: [CLIENT NAME]

MATERIALS LIST (include as much detail as you have):
[LIST YOUR MATERIALS — e.g.,
- Cabinets: Shaker-style white, about 20 linear feet uppers and lowers, mid-grade, estima
  ted $6,500
- Countertops: Quartz, approximately 45 sq ft, mid-range color, estimated $3,200 installe
  d
- Backsplash tile: Subway tile, about 30 sq ft, $800 materials
- Sink: Undermount stainless double bowl, $350
- Faucet: Pull-down sprayer, brushed nickel, $250
- Hardware: Cabinet pulls and knobs, about 30 pieces, $300
- Lighting: 4 recessed LED cans plus under-cabinet strips, $600
- Paint: Walls and ceiling, about 400 sq ft, $200
- Flooring: LVP, 150 sq ft, $1,200]

ADDITIONAL INFO:
- Are these actual quotes or estimates: [ACTUAL QUOTES / ROUGH ESTIMATES]
- Tax rate in my area: [PERCENTAGE, e.g., 8.25%]
- Do I want to show my markup on materials: [YES — show cost and markup separately / NO —
   show final price only]
- Any materials the client is supplying themselves: [LIST OR "None"]

Create a document with:
1. A summary table showing each material category, description, quantity, unit cost, and
  total cost
2. Subtotal, tax, and grand total
3. Notes section flagging any items that are estimates vs. confirmed quotes
4. A note about potential price fluctuations for volatile materials (lumber, copper, etc.
  ) if applicable
```

What You'll Get

A professional, itemized material cost summary with clear categories, pricing, tax calculations, and notes — ready to share with your client or use for your own purchasing and budgeting.

5 Write a "Why We're Worth More Than the Low Bidder" Response

Use this when a client tells you they got a cheaper bid from someone else and you need to explain your value without badmouthing the competition or sounding desperate.

```
[PASTE YOUR CONTEXT BLOCK HERE]

A potential client told me they received a lower bid from another contractor and asked me
   to justify my pricing. I need a professional, confident response that explains why my
  estimate is higher without trashing the competition. I want to win this job on VALUE, n
  ot price.

SITUATION:
- Client name: [CLIENT NAME]
- Project: [PROJECT DESCRIPTION]
- My estimate: $[YOUR AMOUNT]
- Their lower bid: $[THEIR AMOUNT, or "They didn't share the exact number" or "approximat
  ely $X"]
- Key differences I know or suspect between my bid and theirs: [e.g., "I included a 2-yea
  r warranty, I'm using licensed subcontractors for electrical, I specified brand-name ma
  terials, I included permit costs, I carry $2M in liability insurance"]
- Items that are often left out of low bids in my trade: [e.g., "Permit fees, dumpster re
  ntal, final cleanup, proper insulation, paint primer coats, trim work"]
- My company's specific strengths for this project: [e.g., "We've done 15 kitchen remodel
  s in this neighborhood, we have a dedicated project manager, we provide weekly photo up
  dates"]

Write a response that:
1. Thanks them for being transparent about the competing bid
2. Acknowledges that price matters (don't be dismissive)
3. Asks a few smart questions they should ask the other contractor (things that expose ga
  ps in cheap bids)
4. Explains what IS included in my price that may not be in the lower bid
5. Highlights the risks of the cheapest option (without being fear-mongering)
6. Reinforces my specific value and track record
7. Ends with a confident but non-pushy close — puts the ball in their court

Tone: Confident and educational, like a professional who knows their worth. NOT defensive
  , NOT desperate, NOT condescending toward the other contractor. Think trusted advisor,
  not used car salesman.
```

What You'll Get

A persuasive, professional response that positions your company as the smart investment rather than the expensive option — complete with questions the client can use to evaluate the cheaper bid on their own.

6 Compare Two Project Approaches (Cost/Benefit for Client)

Use this when a client is deciding between two different ways to tackle a project and you want to lay out both options clearly so they can make an informed decision.

```
[PASTE YOUR CONTEXT BLOCK HERE]

My client is deciding between two approaches for their project. I want to present both op
  tions in a clear, professional comparison document so they can make an informed decisio
  n. I'm not pushing one option over the other — I want to be a trusted advisor.

CLIENT: [CLIENT NAME]
PROJECT: [PROJECT DESCRIPTION — e.g., "Bathroom renovation at 456 Elm Street"]

OPTION A: [NAME OR SHORT DESCRIPTION — e.g., "Full gut renovation"]
- What it involves: [DESCRIBE THE WORK — e.g., "Remove everything down to the studs. New
  plumbing layout, new electrical, new subfloor, complete redesign of the space including
   relocating the shower and adding a freestanding tub."]
- Estimated cost: $[AMOUNT]
- Estimated duration: [TIMEFRAME]
- Pros I see: [LIST — e.g., "Completely customized layout, addresses all underlying issue
  s, highest resale value"]
- Cons I see: [LIST — e.g., "Higher cost, longer timeline, need to find alternative bathr
  oom for 4-6 weeks"]

OPTION B: [NAME OR SHORT DESCRIPTION — e.g., "Cosmetic refresh with targeted upgrades"]
- What it involves: [DESCRIBE THE WORK — e.g., "Keep existing plumbing layout. Replace va
  nity, toilet, and showerhead. Retile the shower walls and floor. New paint, mirror, lig
  hting, and accessories."]
- Estimated cost: $[AMOUNT]
- Estimated duration: [TIMEFRAME]
- Pros I see: [LIST — e.g., "Lower cost, faster completion, bathroom only out of service
  for 1-2 weeks"]
- Cons I see: [LIST — e.g., "Doesn't address older plumbing behind the walls, layout stay
  s the same, may need a full reno in 5-7 years anyway"]

MY HONEST RECOMMENDATION (optional): [WHICH OPTION AND WHY — or "I genuinely think either
   could work, depends on their priorities"]

Create a professional comparison document with:
1. Brief project context
```

What You'll Get
A clean, side-by-side comparison document that makes you look like a knowledgeable advisor rather than just a contractor pushing the most expensive option. Clients love having clear choices.

7 Generate a Scope of Work Document from a Client Conversation

Use this when you've had a conversation with a client (in person, over the phone, or via email) and need to formalize everything discussed into a proper scope of work document.

```
[PASTE YOUR CONTEXT BLOCK HERE]

I had a conversation with a client about an upcoming project. I need you to turn the details below into a formal Scope of Work (SOW) document that clearly defines what we will and won't do. This document will be attached to our contract, so it needs to be thorough and precise — it protects both me and the client.

CLIENT CONVERSATION SUMMARY:
- Client name: [CLIENT NAME]
- Client address: [PROJECT ADDRESS]
- How we spoke: [IN PERSON AT THEIR HOME / PHONE CALL / EMAIL / VIDEO CALL]
- Date of conversation: [DATE]
- What the client wants done: [DESCRIBE EVERYTHING THEY ASKED FOR — e.g., "They want their deck replaced. Current deck is about 300 sq ft, pressure-treated wood, attached to the house off the back sliding door. It's rotting in several areas. They want composite decking this time, same footprint, with new aluminum railings. They also asked about adding a small built-in bench along one side and would like a gate at the stairs for their dog. They want it done before their 4th of July party."]
- Budget they mentioned: $[AMOUNT OR RANGE OR "didn't discuss specific budget"]
- Decisions still pending: [e.g., "They haven't picked a composite decking color yet," "Need to decide on railing style"]
- Anything I told them we CAN'T do or SHOULDN'T do: [e.g., "I told them adding a hot tub to the deck would require additional structural engineering"]
- Special requests or concerns they raised: [e.g., "They're worried about noise during the project because they work from home," "They have a dog that needs to be kept away from the work area"]

Generate a formal Scope of Work document with these sections:
1. Project Information (client, address, date, project number)
2. Project Description (2-3 sentence overview)
3. Detailed Scope of Work (numbered list of every task, organized by phase)
4. Materials and Specifications (what materials will be used, grade/quality level)
5. Exclusions (what is specifically NOT included — be thorough, this prevents disputes)
6. Client Responsibilities (what they need to provide or do — e.g., material selections by a certain date, clear access, pet management)
7. Timeline and Milestones
```

What You'll Get
A thorough, contract-ready scope of work document that clearly defines deliverables, exclusions, and responsibilities — protecting you from scope creep and your client from surprises.

8 Write a Project Timeline with Milestones for a Proposal

Use this when you need to include a professional timeline in a proposal that shows the client exactly what happens when, so they know you have a real plan and aren't just guessing.

```
[PASTE YOUR CONTEXT BLOCK HERE]

I need a professional project timeline with milestones to include in a proposal. The clie
  nt should be able to look at this and know exactly what will happen each week and when
  key decisions are needed from them.

PROJECT DETAILS:
- Project: [PROJECT DESCRIPTION — e.g., "Complete kitchen remodel"]
- Client: [CLIENT NAME]
- Proposed start date: [DATE OR "TBD"]
- Estimated duration: [e.g., "6-8 weeks"]
- Key phases of work: [LIST THE MAJOR PHASES — e.g., "1) Demo and prep, 2) Rough plumbing
   and electrical, 3) Inspections, 4) Drywall and paint, 5) Cabinet installation, 6) Coun
  tertop templating and installation, 7) Backsplash tile, 8) Fixtures and hardware, 9) Fi
  nal punch list and cleanup"]
- Are there any hard deadlines: [e.g., "Client wants it done before Thanksgiving," "Must
  pass inspection before drywall"]
- Dependencies or potential delays: [e.g., "Cabinets have a 4-week lead time so they need
   to be ordered ASAP," "Countertop templating can't happen until cabinets are fully inst
  alled," "City inspections typically take 2-3 business days to schedule"]
- Client decisions needed and when: [e.g., "Cabinet style and color by week 1, countertop
   material by week 2, backsplash tile by week 3, fixture selections by week 4"]
- Days per week we'll be on site: [e.g., "Monday through Friday" or "Monday through Thurs
  day"]
- Any weeks with known schedule gaps: [e.g., "We won't be on site the week of July 4th"]

Create a timeline that includes:
1. Week-by-week breakdown showing what work happens when
2. Clear milestones marked with specific dates (or "Week X" if no start date yet)
3. Client decision deadlines highlighted separately (so they know when THEY need to act)
4. Inspection points
5. Buffer time built in for realistic scheduling (note where delays commonly happen)
6. A visual-friendly format that looks good in a proposal (use a table or structured list
  )

Add a brief note at the bottom about what could cause delays and how we proactively manag
```

What You'll Get

A week-by-week project timeline with milestones, client decision deadlines, and inspection points — formatted professionally for your proposal and showing the client you have a clear plan from day one.

9 Create an Estimate Follow-Up Email When the Client Hasn't Responded

Use this when you sent an estimate days ago and haven't heard back. This prompt creates a follow-up that's persistent but not pushy — bringing value instead of just asking "did you get my estimate?"

```
[PASTE YOUR CONTEXT BLOCK HERE]

I sent an estimate to a client and they haven't responded. I need a follow-up email that
  checks in without being annoying or desperate. I want to add value, not just nag them.

FOLLOW-UP DETAILS:
- Client name: [CLIENT NAME]
- Project: [PROJECT DESCRIPTION — e.g., "Basement finishing project"]
- Estimate amount: $[AMOUNT]
- Date I sent the estimate: [DATE]
- How many days it's been: [NUMBER]
- How I sent it: [EMAIL / HANDED IN PERSON / MAILED]
- Is this my first follow-up or have I followed up before: [FIRST FOLLOW-UP / SECOND FOLL
  OW-UP / THIRD AND FINAL FOLLOW-UP]
- Did they seem enthusiastic during our meeting: [YES — seemed ready to go / SOMEWHAT — h
  ad some hesitation / HARD TO READ]
- Possible reason they haven't responded: [e.g., "They mentioned they were getting other
  bids," "They seemed unsure about the budget," "They said they needed to talk to their s
  pouse," "No idea"]
- Anything timely I could mention: [e.g., "Material prices are expected to go up next mon
  th," "Our schedule is filling up for the fall," "We just finished a similar project nea
  rby they could see," or "Nothing specific"]

Write a follow-up email that:
1. Has a clear, non-generic subject line
2. Opens with something friendly — NOT "just checking in" or "just following up"
3. Adds some value (a helpful tip, insight, or piece of information relevant to their pro
  ject)
4. Gently references the estimate without being pushy
5. Addresses the likely objection or hesitation if I mentioned one above
6. Makes it easy for them to respond (gives them a simple next step)
7. Closes warmly with no pressure

Adjust the tone based on whether this is my first, second, or third follow-up. The third
  follow-up should be a polite "closing the loop" message that leaves the door open.
```

What You'll Get

A short, professional follow-up email that adds value, addresses likely hesitations, and makes it easy for the client to respond — without sounding like every other "just following up" message in their inbox.

10 Draft a Contract Addendum for Additional Work Discovered During a Project

Use this when you're in the middle of a project and need to formally document additional work that wasn't in the original contract — more thorough than a simple change order, this covers new tasks that are essentially a mini-project within the project.

```
[PASTE YOUR CONTEXT BLOCK HERE]

During an active project, we've discovered additional work that needs to be done (or the
  client has requested additional work). This goes beyond a simple change order — it's si
  gnificant enough to require a formal contract addendum. Write this as a professional le
  gal-style document that I can attach to our existing contract.

ADDENDUM DETAILS:
- Client name: [CLIENT NAME]
- Project address: [ADDRESS]
- Original contract date: [DATE]
- Original contract amount: $[AMOUNT]
- Original scope summary: [1-2 SENTENCE SUMMARY — e.g., "Full bathroom renovation includi
  ng new shower, vanity, flooring, and fixtures"]

ADDITIONAL WORK:
- What was discovered or requested: [DESCRIBE IN DETAIL — e.g., "Upon removing the old sh
  ower pan, we discovered that the drain line is cast iron and corroded. The cast iron dr
  ain runs approximately 15 feet under the slab to the main stack. Plumbing code requires
   replacement. Additionally, the client has asked us to add a heated floor system while
  the floor is already torn up, and to add a linen closet by bumping out into the adjacen
  t hallway closet."]
- Which items are required vs. client-requested: [e.g., "Drain line replacement is requir
  ed by code. Heated floors and linen closet are client requests."]
- Cost of additional work: $[TOTAL AMOUNT]
- Cost breakdown by item: [LIST EACH ITEM AND ITS COST — e.g., "Cast iron drain replaceme
  nt: $4,200 / Heated floor system (materials and install): $2,800 / Linen closet build-o
  ut: $3,500"]
- Additional time needed: [e.g., "7-10 additional working days"]
- Impact on original completion date: [e.g., "Original completion was March 15, new estim
  ated completion is March 28"]
- Are we pausing other work while this is approved: [YES / NO — explain]

Generate a contract addendum that includes:
1. Reference to original contract (date, parties, project address)
```

What You'll Get

A formal, contract-ready addendum that documents the additional work, updated pricing, revised timeline, and payment terms — protecting both you and your client with clear legal language while keeping the project moving forward.

Next up: Section 02 — Client Communication

02 Client Communication

Clear, professional communication is what separates contractors who get repeat business and re

1 Follow-Up Email After an Initial Consultation or Site Visit

Use this immediately after meeting with a potential client to recap what you discussed, reinforce your professionalism, and move them toward signing a contract.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a follow-up email from me to a potential client I just met with for an initial cons
  ultation / site visit. Here are the details:

- Client name: [CLIENT FIRST NAME]
- Project type: [e.g., kitchen remodel, roof replacement, bathroom addition, deck build]
- Key things we discussed on site: [e.g., they want to expand the kitchen into the dining
   room, concerned about timeline due to a family event in June, wants quartz countertops
  ]
- Approximate budget range we discussed: [e.g., $25,000-$35,000]
- Next step I want them to take: [e.g., review the attached estimate, schedule a follow-u
  p call, sign the proposal, choose their finish materials]
- My company name: [YOUR COMPANY NAME]
- My name: [YOUR NAME]
- My phone number: [YOUR PHONE NUMBER]

Write this email in a warm but professional tone. It should:
1. Thank them for their time
2. Briefly recap 2-3 key points from our conversation so they know I was listening
3. Restate the next step clearly
4. Create gentle urgency without being pushy (e.g., mention scheduling availability or ma
  terial lead times if relevant)
5. End with a confident, friendly closing

Keep it under 200 words. Do not use overly salesy language. This should sound like a real
   contractor, not a marketing email.
```

What You'll Get

A polished, personal follow-up email that reminds the client why they liked you, keeps the project moving forward, and makes you stand out from competitors who never follow up.

2 Project Delay Notification (Professional and Blame-Free)

Use this when something pushes your timeline back — weather, material delays, permit issues, subcontractor scheduling — and you need to notify the client before they notice.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a professional email to my client notifying them of a project delay. Here are the d
  etails:

- Client name: [CLIENT FIRST NAME]
- Project type: [e.g., bathroom renovation, siding replacement, basement finishing]
- Original expected completion date: [DATE]
- New estimated completion date: [DATE]
- Reason for the delay: [e.g., county permit approval took longer than expected, a specia
  lty material is backordered for 2 weeks, we lost 4 work days to rain this month, the el
  ectrical rough-in inspection requires a revision]
- What work has been completed so far: [e.g., demo is done, framing is complete, plumbing
   rough-in passed inspection]
- What I am doing to minimize the delay: [e.g., added a Saturday work day, resequenced th
  e remaining tasks, sourced the material from an alternate supplier]
- My company name: [YOUR COMPANY NAME]
- My name: [YOUR NAME]
- My phone number: [YOUR PHONE NUMBER]

Write this email so that it:
1. Leads with transparency — state the delay clearly in the first two sentences
2. Explains the reason honestly without blaming anyone or making excuses
3. Shows the client I am actively managing the situation by listing the steps I am taking
4. Highlights the progress that HAS been made so they know work is moving
5. Provides the updated timeline with confidence
6. Offers to discuss by phone if they have concerns
7. Keeps a calm, in-control, professional tone throughout

Keep it under 250 words. Do not be overly apologetic — one sincere apology is enough. The
   goal is to maintain trust and confidence.
```

What You'll Get

A straightforward, trust-building delay notice that keeps clients calm and informed. Proactive communication like this is the number one way to prevent small delays from turning into big conflicts.

3 Payment Reminder — Gentle First Notice

Use this when an invoice is 3-7 days past due. This is a friendly nudge, not a demand. The tone assumes it was simply overlooked.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a gentle, friendly payment reminder email to my client. Here are the details:

- Client name: [CLIENT FIRST NAME]
- Invoice number: [INVOICE NUMBER]
- Invoice amount: [DOLLAR AMOUNT]
- Invoice date: [DATE THE INVOICE WAS SENT]
- Due date: [ORIGINAL DUE DATE]
- What the invoice is for: [e.g., 50% progress payment for kitchen remodel, final payment for roof replacement, deposit for deck project]
- How they can pay: [e.g., check mailed to our office, online payment at our website, Zelle to our business email, credit card by phone]
- My company name: [YOUR COMPANY NAME]
- My name: [YOUR NAME]
- My phone number: [YOUR PHONE NUMBER]

Write this email so that it:
1. Opens in a warm, non-confrontational way — assume they simply forgot or it slipped through the cracks
2. Clearly states the invoice number, amount, and original due date
3. Mentions the payment methods available to make it easy for them
4. Does NOT use words like "overdue," "delinquent," or "failure to pay"
5. Keeps the tone as if I'm just sending a helpful reminder between two people with a good relationship
6. Ends by inviting them to reach out if they have any questions about the invoice

Keep it under 150 words. Short, warm, and easy to act on.
```

What You'll Get

A brief, friendly reminder that gets invoices paid without making the client feel accused or pressured. Most late payments at this stage are genuine oversights, and this email makes it easy to fix.

4 Payment Reminder — Firm Second Notice

Use this when your first reminder went unanswered and the invoice is now 14-21 days past due. The tone shifts to polite but direct.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a firm but professional second payment reminder email to my client. Here are the details:

- Client name: [CLIENT FIRST NAME]
- Invoice number: [INVOICE NUMBER]
- Invoice amount: [DOLLAR AMOUNT]
- Original due date: [ORIGINAL DUE DATE]
- Number of days past due: [e.g., 18 days]
- Date I sent the first reminder: [DATE]
- What the invoice is for: [e.g., progress payment for bathroom remodel, final payment for fence installation]
- Any impact on the project if not paid: [e.g., I cannot order the next phase of materials, remaining work is paused per our contract, the project is complete but final warranty activation requires payment in full]
- How they can pay: [e.g., check, Zelle, credit card, online portal]
- Contract payment terms if applicable: [e.g., net 15, due upon receipt, payment due before final phase begins]
- My company name: [YOUR COMPANY NAME]
- My name: [YOUR NAME]
- My phone number: [YOUR PHONE NUMBER]

Write this email so that it:
1. References my previous reminder so they know this is a follow-up
2. States the amount and how far past due it is — clearly and factually
3. Mentions any project impact caused by the outstanding balance (if applicable)
4. References the agreed-upon payment terms from our contract
5. Maintains a respectful, professional tone — firm but never hostile
6. Requests a specific response — either payment or a call to discuss
7. Gives a clear deadline: asks them to respond or pay within [5 / 7] business days

Keep it under 200 words. The goal is to communicate that this is serious while leaving the door open for a reasonable conversation.
```

What You'll Get

A professional second notice that clearly communicates urgency and consequences without burning the relationship. This email creates accountability while still treating the client with respect.

5 Payment Reminder — Final Notice Before Escalation

Use this when previous reminders have been ignored and the invoice is 30+ days past due. This is the last step before involving collections, a lien, or legal action.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a final payment notice email to my client. This is the last communication before I
  escalate. Here are the details:

- Client name: [CLIENT FIRST NAME AND LAST NAME]
- Invoice number: [INVOICE NUMBER]
- Invoice amount: [DOLLAR AMOUNT]
- Original due date: [ORIGINAL DUE DATE]
- Total days past due: [e.g., 35 days]
- Dates of previous reminders sent: [e.g., first reminder on Jan 15, second reminder on J
  an 28]
- What the invoice is for: [e.g., completed roof replacement at 123 Oak Street]
- The next step I will take if not paid: [e.g., file a mechanic's lien on the property, r
  efer the balance to a collections agency, consult with my attorney, pursue the matter i
  n small claims court]
- Deadline for payment to avoid escalation: [DATE — typically 7-10 days from this email]
- How they can pay: [e.g., check, Zelle, credit card, online portal]
- My company name: [YOUR COMPANY NAME]
- My name: [YOUR NAME]
- My phone number: [YOUR PHONE NUMBER]

Write this email so that it:
1. Clearly states this is a final notice — use those exact words
2. Provides a factual timeline: invoice date, amount, due date, and dates of all previous
   attempts to resolve
3. States the specific next step I will take and the deadline to avoid it
4. Remains professional and factual — no threats, no emotion, no insults
5. Gives them one last clear opportunity to pay or contact me to discuss a payment arrang
  ement
6. Mentions that I would prefer to resolve this directly and am still open to a conversat
  ion
7. Is written in a tone that would hold up well if it were ever read in court or mediatio
  n

Keep it under 250 words. Every sentence should be factual, measured, and defensible.
```

What You'll Get

A documented, professional final notice that protects you legally, gives the client one last chance to resolve the balance, and establishes a clear paper trail if you need to escalate.

6 "Project Complete" Handoff Email with Warranty Info

Use this when you have finished the job, passed final inspection (if applicable), and are ready to officially hand the completed project over to the client.


```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a project completion and handoff email to my client. Here are the details:

- Client name: [CLIENT FIRST NAME]
- Project type: [e.g., full kitchen remodel, new deck construction, bathroom renovation]
- Project address: [ADDRESS]
- Completion date: [DATE]
- Final inspection status: [e.g., passed city inspection on March 10, no inspection requi
  red for this scope, certificate of occupancy issued]
- Warranty details: [e.g., 1-year workmanship warranty on all labor, manufacturer's 25-ye
  ar warranty on roofing materials, 2-year warranty covering defects in materials and lab
  or — describe what YOUR warranty covers]
- How to submit a warranty claim: [e.g., call our office, email us, fill out a form on ou
  r website]
- Any maintenance tips or care instructions: [e.g., reseal the deck annually, run the bat
  hroom exhaust fan during showers to protect grout, avoid abrasive cleaners on quartz co
  untertops]
- Anything the client should keep on file: [e.g., permit documents, manufacturer warranty
   registration cards, appliance manuals, paint color codes]
- My company name: [YOUR COMPANY NAME]
- My name: [YOUR NAME]
- My phone number: [YOUR PHONE NUMBER]
- My email: [YOUR EMAIL]

Write this email so that it:
1. Congratulates the client on their completed project — make them feel good about their
  investment
2. Confirms the project is officially complete and lists any inspection approvals
3. Clearly explains the warranty coverage, duration, and how to reach me if something com
  es up
4. Includes 2-3 practical maintenance tips so they can protect their investment
5. Lists the documents they should save for their records
6. Lets them know I am available if they have any questions in the coming weeks
7. Ends on a warm, personal note — I enjoyed working with them and hope they love the res
  ult

Keep it under 300 words. Professional but genuinely warm. This is the last impression I l
  eave.
```

What You'll Get

A comprehensive, client-friendly handoff email that covers warranty details, maintenance advice, and important documents — all in one place. This is the kind of email clients forward to their spouse and save permanently.

7 Request for a Google Review (After Successful Project)

Use this 3-7 days after project completion, once the client has had a chance to enjoy the finished result. Only send this when you are confident the client is happy.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a short, personal email asking my client to leave me a Google review. Here are the
  details:

- Client name: [CLIENT FIRST NAME]
- Project type we completed: [e.g., master bathroom remodel, new patio, exterior painting
  ]
- One specific thing that went well or that the client complimented during the project: [
  e.g., they loved how we kept the workspace clean, they said the tile work exceeded thei
  r expectations, they were impressed we finished ahead of schedule]
- My Google review link: [YOUR GOOGLE REVIEW LINK — find this in your Google Business Pro
  file]
- My company name: [YOUR COMPANY NAME]
- My name: [YOUR NAME]

Write this email so that it:
1. Opens with a genuine, personal touch — reference the specific project and the complime
  nt or positive moment
2. Explains that online reviews are extremely important for a small business like mine
3. Makes the ask directly and confidently — do not be apologetic about asking
4. Includes the direct Google review link so it takes ONE click
5. Tells them it only takes 2 minutes
6. Suggests 2-3 things they could mention in their review to help them get started (e.g.,
   quality of work, communication, cleanliness, timeliness) — frame these as gentle sugge
  stions, not a script
7. Thanks them sincerely whether or not they leave a review

Keep it under 150 words. Warm, brief, and easy to act on. The easier you make it, the mor
  e reviews you get.
```

What You'll Get

A natural, low-pressure review request that actually gets responses. Most happy clients are willing to leave a review — they just need someone to ask and make it easy.

8 Response to a Negative Online Review (De-escalation)

Use this when you receive a negative review on Google, Yelp, or another platform. This response is public-facing, so it needs to be calm, professional, and aimed at anyone reading it — not just the reviewer.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a professional, de-escalating public response to a negative online review of my con
  tracting business. Here are the details:

- Reviewer's name (as shown on the review): [REVIEWER NAME]
- Platform: [e.g., Google, Yelp, Angi, BBB]
- What they complained about: [e.g., project took longer than expected, they feel the pri
  ce was too high, they are unhappy with a specific aspect of the finished work, they say
   we did not communicate well]
- Is their complaint valid or partially valid? [BE HONEST — e.g., yes the project ran 2 w
  eeks over due to weather, partially — there was a miscommunication about the scope, no
  — we completed exactly what was in the signed contract]
- What actually happened from my perspective: [BRIEF FACTUAL SUMMARY — e.g., we experienc
  ed permit delays, the client requested 3 change orders that extended the timeline, the
  issue they mention was addressed under warranty but they did not respond to our calls]
- What resolution I can offer or have already offered: [e.g., I have already offered to c
  ome back and address the issue, I would like to discuss this privately, the work was co
  mpleted per the contract and passed inspection]
- My company name: [YOUR COMPANY NAME]
- My name and title: [YOUR NAME, e.g., Owner]

Write this response so that it:
1. Addresses the reviewer by name
2. Thanks them for their feedback — sincerely, not sarcastically
3. Acknowledges their frustration without admitting fault where none exists
4. Briefly provides my side of the story with FACTS only — no emotion, no defensiveness
5. Offers a clear next step to resolve the issue offline (phone call or email)
6. Is written for the AUDIENCE of future potential clients reading this review — they are
   the real target
7. Keeps a tone that is calm, professional, and solution-oriented
8. Does NOT include any personal attacks, sarcasm, or passive-aggressive language

Keep it under 150 words. Short, professional responses look better than long defensive on
  es.
```

What You'll Get

A measured, professional public response that protects your reputation with future clients who read the review. The goal is not to "win" the argument — it is to show every future reader that you handle problems like a professional.

9 Weekly Project Status Update for the Client

Use this every Friday (or whatever day you choose) to keep your client informed about what happened this week and what is coming next. Proactive updates prevent 90% of "just checking in" calls and texts.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a weekly project status update email to my client. Here are the details:

- Client name: [CLIENT FIRST NAME]
- Project type: [e.g., home addition, kitchen remodel, new roof]
- Project address: [ADDRESS]
- Week number or date range: [e.g., Week 3, March 17-21]
- Work completed this week: [LIST WHAT GOT DONE — e.g., drywall hanging completed in all
  rooms, electrical rough-in passed inspection, cabinet delivery received and stored on s
  ite, tile installation started in master bath]
- Any issues or changes this week: [e.g., discovered some old knob-and-tube wiring that n
  eeds to be addressed, one backordered light fixture pushed back to next week, rain dela
  yed exterior work by one day — or "none" if everything went smoothly]
- Work planned for next week: [LIST WHAT IS COMING — e.g., drywall taping and mudding, pl
  umbing fixture installation, cabinet installation begins, painter starts on Tuesday]
- Any decisions or actions needed from the client: [e.g., please finalize your backsplash
   tile selection by Wednesday so we can order in time, no action needed from you this we
  ek, please confirm the paint colors for the upstairs bedrooms]
- Overall project status: [e.g., on schedule, 2 days ahead of schedule, approximately 3 d
  ays behind due to weather — will make up next week]
- Estimated percentage complete: [e.g., approximately 40% complete]
- My company name: [YOUR COMPANY NAME]
- My name: [YOUR NAME]
- My phone number: [YOUR PHONE NUMBER]

Write this email so that it:
1. Is organized with clear sections (This Week / Issues / Next Week / Action Items)
2. Uses bullet points for easy scanning — clients should get the picture in 30 seconds
3. Leads with progress and accomplishments before mentioning any issues
4. Clearly flags anything the client needs to do, with a deadline
5. Gives an honest overall status — do not sugarcoat, but keep it confident
6. Ends with an invitation to call or reply with questions
7. Maintains a professional, upbeat, in-control tone

Keep it under 250 words. Format it for easy scanning on a phone screen.
```

What You'll Get

A clean, organized weekly update that keeps your client informed and confident. Contractors who send these consistently get fewer mid-week interruptions, better online reviews, and more referrals.

10 "We'd Love to Work with You Again" Re-Engagement Email for Past Clients

Use this to reach out to clients you completed work for 6-18 months ago. Past clients are your best source of repeat business and referrals, but most contractors never follow up.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a re-engagement email to a past client I would like to reconnect with. Here are the
   details:

- Client name: [CLIENT FIRST NAME]
- Project we completed for them: [e.g., finished basement, new deck, full exterior paint]
- Approximate date we completed their project: [e.g., about a year ago, back in spring 20
  25]
- How the project turned out: [e.g., they were very happy, they loved the final result, t
  hey told us it was exactly what they wanted]
- A seasonal or timely hook (optional): [e.g., spring is a great time to tackle outdoor p
  rojects, we are currently booking summer projects and slots are filling up, winter is t
  he best time to get interior work done at a lower price — or leave blank if not applica
  ble]
- A service or offer I want to mention: [e.g., we now offer deck staining and maintenance
   packages, we are running a 10% discount for returning clients this quarter, we have ex
  panded into bathroom remodels — or just a general "if you have any projects in mind" me
  ssage]
- My company name: [YOUR COMPANY NAME]
- My name: [YOUR NAME]
- My phone number: [YOUR PHONE NUMBER]
- My email: [YOUR EMAIL]

Write this email so that it:
1. Opens by referencing our past project together — make it personal, not generic
2. Asks how they are enjoying the finished result (this feels genuine and opens the door)
3. Mentions the seasonal hook or new offering naturally — not as a hard sell
4. Lets them know I would love to help with any future projects, big or small
5. Asks them to pass my name along if they know anyone who needs work done (a soft referr
  al request)
6. Keeps the tone warm, casual, and zero-pressure — this is a relationship touchpoint, no
  t a sales pitch
7. Is short enough that they will actually read the whole thing

Keep it under 175 words. Think of this as a friendly check-in from someone they already t
  rust, not a cold email.
```

What You'll Get

A natural, personal re-engagement email that reminds past clients you exist, opens the door for new projects, and generates referrals — all without feeling like a marketing blast.

03 Project Management

Running a profitable job means keeping every detail on track — from the first day of demo to the f

1 Break a Project Scope into a Detailed Task-by-Task Schedule

Use this when you've signed a contract and need to turn the overall scope into a day-by-day (or week-by-week) work plan with task dependencies, crew assignments, and milestones.

```
[PASTE YOUR CONTEXT BLOCK HERE]

I need you to create a detailed task-by-task project schedule for the following job:

Project type: [e.g., Full kitchen remodel, 200 sq ft bathroom addition, re-roof of 2,400
  sq ft ranch home]
Project address / name: [JOB NAME OR ADDRESS]
Total contract value: $[AMOUNT]
Target start date: [DATE]
Target completion date: [DATE]
Key scope items: [LIST THE MAJOR SCOPE ITEMS — e.g., demo existing kitchen, rough plumbin
  g relocation, electrical panel upgrade, drywall, cabinet install, countertop templating
   and install, tile backsplash, painting, final trim, appliance install]
Crew size available: [NUMBER OF CREW MEMBERS AND THEIR ROLES — e.g., 2 laborers, 1 lead c
  arpenter, 1 apprentice]
Subcontractors needed: [LIST TRADES — e.g., plumber, electrician, HVAC, countertop fabric
  ator]
Inspections required: [LIST ANY KNOWN INSPECTIONS — e.g., rough plumbing, rough electrica
  l, framing, final building inspection]
Known constraints or scheduling notes: [e.g., Homeowner is living in the house, material
  lead time on cabinets is 4 weeks, electrician is only available Tuesdays and Thursdays]

Create a detailed schedule that includes:
1. Every task broken down into individual work items (not just phases — actual tasks)
2. Duration estimate for each task (in hours or days)
3. Task dependencies (what has to finish before the next task can start)
4. Which crew member or subcontractor is responsible for each task
5. Inspection hold points clearly marked
6. Material delivery dates and lead times built into the schedule
7. A buffer/contingency recommendation
8. Key milestones the client would care about (e.g., "kitchen usable again")

Format this as a table or numbered list organized by week, with clear start and end dates
   for each task.
```

What You'll Get

A complete, day-by-day project schedule you can print for the job site wall, share with your client, and use to hold your crew and subs accountable. It will flag task dependencies so you know exactly what needs to happen in what order.

2 Create a Daily Crew Briefing from a Project Plan

Use this each morning (or the night before) to turn your project plan into a clear, focused briefing so your crew knows exactly what they're doing today, what materials they need, and what the priorities are.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Create a daily crew briefing for tomorrow's work day on this job:

Project: [JOB NAME OR ADDRESS]
Date: [TOMORROW'S DATE]
Overall project status: [e.g., Week 3 of 6, on schedule / 2 days behind]
What was completed today: [LIST WHAT GOT DONE TODAY — e.g., finished demo of master bath,
   rough plumbing passed inspection]
What is scheduled for tomorrow: [LIST THE PLANNED TASKS — e.g., frame new shower wall, ru
  n electrical for vanity lighting, start cement board install]
Crew on site tomorrow: [LIST NAMES AND ROLES — e.g., Mike (lead), Danny (laborer), Tony (
  apprentice)]
Subcontractors on site tomorrow: [LIST ANY SUBS AND THEIR SCOPE — e.g., Dave's Electric,
  wiring bathroom circuits]
Materials needed: [LIST MATERIALS THAT NEED TO BE ON SITE — e.g., 10 sheets cement board,
   cement board screws, electrical boxes, 12/2 Romex]
Tools or equipment needed: [LIST ANY SPECIAL TOOLS — e.g., tile saw, scaffolding, generat
  or]
Known issues or concerns: [e.g., Homeowner asked us to keep noise down before 8 AM, inspe
  ctor might do a surprise visit, weather calling for rain]
Safety notes: [ANY SPECIFIC HAZARDS — e.g., open floor joists in hallway, live panel near
  by, lead paint in adjacent room]

Format the briefing as a simple, printable one-page document with these sections:
1. Today's Date and Job Site Address
2. Today's Goals (top 3 priorities — what MUST get done)
3. Task Assignments (who is doing what, with time estimates)
4. Materials and Tools Checklist (confirm everything is on site)
5. Subcontractor Coordination (arrival times, what they need from us)
6. Safety Reminders (specific to today's work)
7. Open Issues / Heads Up (anything the crew needs to be aware of)

Keep the language simple and direct — this is for guys on a job site, not a boardroom.
```

What You'll Get

A one-page daily briefing you can print or text to your crew. It eliminates the "what are we doing today?" conversations and makes sure everyone shows up ready to work.

3 Generate a Punch List from Inspection Notes or Walkthrough Observations

Use this after a walkthrough, inspection, or client meeting where you jotted down rough notes about items that need attention. The AI will organize your messy notes into a professional, actionable punch list.

```
[PASTE YOUR CONTEXT BLOCK HERE]

I just completed a [PRE-FINAL WALKTHROUGH / FINAL WALKTHROUGH / INSPECTION / CLIENT WALKT
  HROUGH] on this project:

Project: [JOB NAME OR ADDRESS]
Project type: [e.g., Whole-home renovation, bathroom remodel, new construction]
Current project phase: [e.g., Finishing phase, pre-drywall, substantial completion]
Walkthrough conducted by: [YOUR NAME and anyone else present — e.g., me and the homeowner
  , me and the building inspector]

Here are my raw notes from the walkthrough. They may be messy, abbreviated, or out of ord
  er — clean them up into a professional punch list:

[PASTE YOUR RAW NOTES HERE — e.g.:
- kitchen cabinet door 3rd from left not aligned
- paint touch up needed on dining room ceiling near light fixture
- outlet cover missing in hallway by bathroom
- grout in master shower has gap near corner, bottom left
- front door weatherstrip not sealing at bottom
- garage door opener light doesn't work — might be bulb
- client wants to confirm paint color on accent wall matches sample
- caulk gap where kitchen counter meets backsplash on left side
- bathroom exhaust fan is louder than expected
- trim nail holes in living room baseboard not filled
- deck railing post feels slightly loose, second from stairs]

Organize these into a professional punch list with:
1. Item number
2. Location (room/area)
3. Description of the issue (clear and specific)
4. Trade or person responsible (e.g., painter, electrician, GC crew, plumber)
5. Priority level (Critical / Standard / Cosmetic)
6. Estimated time to fix (quick estimate)

Sort the list by location, then by priority within each location. Add a summary at the to
  p showing total items and breakdown by priority level. Format as a table I can print an
```

What You'll Get
A clean, organized punch list sorted by location and priority, with trade assignments and time estimates. You can print it, hand it to your crew, and check items off as they get completed.

4 Write a Subcontractor Scope-of-Work Agreement

Use this when you're bringing a subcontractor onto a project and need a clear written agreement defining exactly what they're responsible for, payment terms, and expectations. This is NOT a substitute for legal review on large contracts, but it covers the essentials for typical sub agreements.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a professional subcontractor scope-of-work agreement for the following:

My company (General Contractor): [YOUR COMPANY NAME]
Subcontractor company: [SUB'S COMPANY NAME]
Subcontractor contact: [SUB'S NAME, PHONE, EMAIL]
Project name / address: [JOB NAME AND ADDRESS]
Client / property owner: [CLIENT NAME — the sub doesn't need to know the contract amount,
   just who the property owner is]

Trade / scope of work: [DESCRIBE EXACTLY WHAT THE SUB IS DOING — e.g., Complete rough and
   finish plumbing for master bathroom addition including new shower valve, toilet flange
  , double vanity supply and drain, and connecting to existing main line in crawl space]
Specific inclusions: [LIST WHAT IS INCLUDED — e.g., all plumbing materials, fixtures supp
  lied by GC, sub provides labor and fittings, sub pulls permit]
Specific exclusions: [LIST WHAT IS NOT INCLUDED — e.g., drywall patching after rough-in,
  fixture installation is separate, no work on existing water heater]

Agreed price: $[AMOUNT]
Payment structure: [e.g., 50% at rough-in completion, 50% at final completion / Net 30 af
  ter completion / progress payments weekly]
Payment conditions: [e.g., Payment contingent on passing rough inspection, GC approval of
   work quality]

Start date: [DATE]
Completion deadline: [DATE]
Work hours: [e.g., Monday–Friday, 7 AM – 4 PM]

Insurance requirements: [e.g., Sub must carry general liability minimum $1M, workers comp
   required, provide COI before starting]
Licensing: [e.g., Sub must hold valid state plumbing license]
Warranty: [e.g., 1-year warranty on labor and materials from date of completion]

Additional terms or notes: [e.g., Sub is responsible for cleanup of their work area daily
```

What You'll Get
A ready-to-sign subcontractor agreement covering scope, payment, schedule, insurance, warranty, and expectations. Print two copies, sign both, and each party keeps one. For contracts over $25K or high-risk work, have your attorney review it.

5 Create a Job Site Safety Briefing for a Specific Project Type

Use this before starting a new project to create a safety briefing tailored to the specific hazards of the job. Great for the kickoff meeting, posting on the job site, or documenting that safety was addressed.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Create a job site safety briefing document for the following project:

Project: [JOB NAME OR ADDRESS]
Project type: [e.g., Residential roof replacement, commercial bathroom gut renovation, new deck construction, interior demolition of 1970s ranch home]
Project duration: [e.g., 2 weeks]
Crew size: [NUMBER OF PEOPLE ON SITE]
Subcontractors on site: [LIST TRADES THAT WILL BE ON SITE — e.g., roofers, electricians, plumbers, HVAC]

Specific hazards I know about for this project:
[LIST ANY KNOWN HAZARDS — e.g.:
- House was built in 1965, possible lead paint and asbestos
- 2-story roof work required
- Attic work in summer heat (100°F+ expected)
- Homeowner has dogs in fenced backyard
- Live electrical panel will be exposed during demo
- Narrow lot with limited staging area, close to public sidewalk
- Heavy materials (concrete pavers, bundles of shingles) need to go to second floor]

Create a comprehensive safety briefing that includes:
1. Project-specific hazards (based on what I listed above PLUS anything else that is common for this type of project that I may have missed)
2. Required PPE for each phase of work
3. Fall protection requirements (if applicable)
4. Electrical safety protocols
5. Hazardous material handling (lead, asbestos, silica dust, etc. — if applicable)
6. Heat/cold illness prevention (based on the likely working conditions)
7. Tool and equipment safety reminders
8. Emergency procedures (who to call, nearest hospital, first aid kit location)
9. Public safety (pedestrians, homeowner's family, neighbors)
10. Housekeeping and site organization rules
11. Sign-off section where each crew member prints their name and signs acknowledging the briefing
```

What You'll Get
A printable job site safety briefing customized to your specific project, with hazard identification, PPE requirements, emergency procedures, and a crew sign-off sheet. This protects your team and documents your safety practices.

6 Generate a Material Ordering Checklist from Project Specs

Use this when you're ready to order materials for a job and want to make sure you don't miss anything. Feed it your project scope and it will generate a comprehensive materials list organized by trade and phase.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Generate a complete material ordering checklist for the following project:

Project: [JOB NAME OR ADDRESS]
Project type: [e.g., 10x12 bathroom remodel down to studs, 400 sq ft deck build, full kit
  chen renovation]

Detailed scope of work:
[DESCRIBE THE FULL SCOPE IN AS MUCH DETAIL AS POSSIBLE — e.g.:
- Demo existing bathroom to studs and subfloor
- Replace subfloor (existing is particle board, replacing with 3/4" plywood)
- Frame new 3x4 walk-in shower in place of tub
- New window in shower area (vinyl, frosted glass)
- Cement board on all wet walls
- Tile shower walls floor to ceiling with 12x24 porcelain tile
- Tile shower floor with 2x2 mosaic tile
- Heated floor system under 12x24 porcelain floor tile
- New vanity (60" double), quartz countertop, undermount sinks
- New toilet (comfort height, elongated)
- Recessed lighting (4 LED cans), vanity light fixture, exhaust fan
- All new plumbing fixtures (shower valve, showerhead, faucets)
- Paint ceiling and any non-tiled walls
- New baseboard trim, door casing, and door]

Selections already made (if any):
[LIST ANY PRODUCTS ALREADY CHOSEN — e.g., Tile is from Floor & Decor SKU #12345, vanity i
  s from Home Depot order #67890, toilet is Kohler Highline]

Preferred suppliers: [e.g., Home Depot for lumber and general materials, Floor & Decor fo
  r tile, Ferguson for plumbing fixtures, local electrical supply house]

Create a material checklist organized by:
1. Phase of work (demo, framing, rough plumbing, rough electrical, insulation/moisture ba
  rrier, substrate/cement board, tile, fixtures/trim, paint, final)
2. For each item include: material description, estimated quantity, unit of measure, and
```

What You'll Get

A comprehensive, phase-by-phase material checklist with quantities, lead time warnings, and commonly forgotten items flagged. Print it out, take it to the supply house, or use it to build your order online. No more emergency runs for a $3 part that holds up the whole job.

7 Write a Project Handoff Document When Transferring to Another Crew Lead

Use this when you're handing a project off to another crew lead, superintendent, or project manager — whether it's because you're moving to another job, going on vacation, or transitioning the project to a finishing crew. This ensures nothing gets lost in the handoff.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a project handoff document for the following transition:

Project: [JOB NAME OR ADDRESS]
Client name and contact info: [CLIENT NAME, PHONE, EMAIL]
Project type: [e.g., Whole-home renovation, commercial tenant buildout]
Total contract value: $[AMOUNT]
Original start date: [DATE]
Original completion date: [DATE]
Current projected completion date: [DATE — if different from original]

Outgoing lead (me): [YOUR NAME]
Incoming lead: [NEW LEAD'S NAME]
Handoff date: [DATE]

Current project status:
[DESCRIBE WHERE THE PROJECT STANDS — e.g.:
- Demo complete
- Framing 90% complete — need to finish closet header in master bedroom
- Rough plumbing passed inspection 3/15
- Rough electrical scheduled for 3/20, inspector is Dave Miller
- HVAC rough-in not started, sub (Mike's HVAC) scheduled to start 3/22
- Drywall delivery scheduled for 3/25]

Outstanding issues and open items:
[LIST ANYTHING UNRESOLVED — e.g.:
- Client is unhappy with the window placement in the guest room — wants to discuss moving
   it 6 inches left. I told them we'd review before drywall.
- Permit revision needed for the added recessed lights in living room — plans examiner is
   Jennifer at the city.
- Subfloor in laundry room had moisture damage worse than expected — we sistered the jois
  ts but incoming lead should monitor.
```

What You'll Get
A thorough handoff document covering project status, open issues, budget, key contacts, and everything the new lead needs to pick up the job without missing a beat. This prevents the costly mistakes and client frustration that come from poor communication during transitions.

8 Create a Quality Control Checklist for a Specific Type of Work

Use this before your crew starts a specific phase of work (or before a client walkthrough) to make sure every detail meets your quality standards. Great for training new crew members on what "done right" looks like.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Create a detailed quality control (QC) checklist for the following type of work:

Type of work: [e.g., Interior painting, tile shower installation, hardwood floor install,
   cabinet installation, deck framing, drywall finishing, trim carpentry]
Project context: [e.g., High-end kitchen remodel for detail-oriented client, rental property turnover where speed matters, new construction to code minimum]
Quality standard: [e.g., Premium/showroom quality, standard residential, builder-grade]

Specific details about this installation:
[DESCRIBE THE SPECIFICS — e.g., for interior painting:
- Rooms: Living room, dining room, hallway, 3 bedrooms
- Ceiling height: 9 feet
- Walls are fresh drywall with Level 4 finish
- Paint: Benjamin Moore Regal Select, eggshell on walls, flat on ceilings
- Colors: 2 different wall colors, all ceilings same white
- Trim: semi-gloss white on all baseboards, casings, and crown molding
- Special notes: Accent wall in dining room with darker color]

Create a QC checklist that includes:

1. **Pre-Work Inspection** — what to check BEFORE starting (surface prep, conditions, materials verification)
2. **In-Progress Checkpoints** — what to verify DURING the work at key stages
3. **Final Inspection Criteria** — specific pass/fail items to check when the work is "done," including:
   - Visual standards (what to look for from 3 feet, 5 feet, and across the room)
   - Functional standards (does everything work as intended)
   - Code compliance items (if applicable)
   - Cleanliness and protection of adjacent work
4. **Common Defects to Watch For** — the most frequent mistakes or quality issues for this type of work, so the crew knows what to avoid
5. **Sign-Off Section** — lines for the crew member who completed the work, the crew lead
   who inspected it, and the date
```

What You'll Get
A detailed, printable QC checklist tailored to the exact type of work you're doing, with pre-work, in-progress, and final inspection criteria. Use it to train your crew on your standards, catch issues before the client does, and document that quality was verified.

9 Create a Job Site Incident or Safety Report

Use this any time there's an accident, injury, near-miss, or safety concern on a job site. Proper documentation protects you legally, satisfies OSHA requirements, and helps you prevent it from happening again.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Create a professional job site incident/safety report for the following event:

Date and time of incident: [DATE AND TIME]
Location: [JOB SITE ADDRESS AND SPECIFIC AREA — e.g., "Second floor bathroom, near the shower rough-in"]
Project: [JOB NAME OR ADDRESS]

Type of incident: [CHOOSE: Injury / Near-Miss / Property Damage / Equipment Failure / Safety Violation / Environmental (spill, exposure)]

Description of what happened:
[DESCRIBE IN YOUR OWN WORDS — e.g., "Crew member stepped on a nail that went through his boot. He was carrying drywall sheets and didn't see the board with exposed nails on the floor. Puncture wound to the right foot."]

People involved:
- Injured/affected person: [NAME, ROLE]
- Witnesses: [NAMES AND ROLES]
- Person reporting: [YOUR NAME]

Immediate actions taken:
[WHAT DID YOU DO RIGHT AWAY — e.g., "Administered first aid on site, cleaned wound, applied bandage. Sent him to urgent care for tetanus shot. Cleared the work area of all debris with exposed nails."]

Weather/site conditions at time of incident: [e.g., "Clear, dry, indoor work, area was well-lit"]

Was PPE being worn? [DESCRIBE — e.g., "Hard hat yes, safety glasses yes, steel-toe boots no — was wearing regular work boots"]

Generate a formal incident report that includes:
1. Incident summary (factual, objective language — no blame or speculation)
```

What You'll Get

A thorough, professionally written incident report that protects you legally, satisfies documentation requirements, and includes corrective actions to prevent the same issue from happening again.

10 Write a Crew Member Performance Review

Use this for quarterly or annual performance reviews, or when you need to document performance issues. A written review protects you legally and helps good crew members grow.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a performance review for a crew member with the following details:

Employee name: [NAME]
Role/title: [e.g., "Lead Carpenter", "Apprentice Electrician", "General Laborer"]
Time in role: [e.g., "8 months", "2 years"]
Review period: [e.g., "January 2025 — June 2025"]
Review type: [CHOOSE: Routine Quarterly / Annual / Performance Improvement / Pre-Promotion]

Performance observations (fill in what applies):

Strengths / What they do well:
[LIST 2-5 — e.g., "Shows up on time every day", "Excellent tile work — clients have complimented it twice", "Takes initiative to clean up the site without being asked", "Good with clients — professional and polite"]

Areas needing improvement:
[LIST 1-3 — e.g., "Frequently on phone during work hours", "Cuts corners on cleanup at end of day", "Doesn't communicate delays to crew lead until it's too late", "Needs to improve framing speed — currently about 70% of expected pace"]

Notable incidents (positive or negative):
[LIST ANY — e.g., "Caught a plumbing rough-in error before the inspector did — saved us a failed inspection", "Was 30+ minutes late three times in March without calling ahead"]

Overall rating: [CHOOSE: Exceeds Expectations / Meets Expectations / Needs Improvement / Unsatisfactory]

Goals for next review period:
[LIST 2-3 — e.g., "Complete OSHA 30 certification", "Be able to independently lead a small crew on a bathroom remodel", "Zero unexcused tardiness"]

Any compensation change being discussed? [e.g., "$2/hr raise", "Promotion to crew lead", "No change at this time", "Probationary period"]
```

What You'll Get
A structured performance review document that helps you have productive conversations with your crew, document performance for legal protection, and build a culture where good work gets recognized.

11 Create a Warranty Callback Tracking and Response Plan

Use this when a past client calls about a warranty issue. Having a documented process protects you from liability disputes and turns callbacks into trust-building moments.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Create a warranty callback response plan for the following situation:

Client name: [NAME]
Original project: [e.g., "Full kitchen remodel", "Roof replacement", "Bathroom tile and p
  lumbing"]
Project completion date: [DATE]
Warranty period: [e.g., "1 year workmanship", "2 years on materials", "Per manufacturer w
  arranty"]

Issue reported by client:
[DESCRIBE — e.g., "Grout cracking in shower tiles after 6 months", "Roof leak near chimne
  y flashing", "Cabinet door hinge came loose"]

Client's tone/urgency: [CHOOSE: Calm / Frustrated / Angry / Urgent safety concern]

Generate a warranty callback response plan that includes:
1. Initial response script (what to say when the client calls or emails — professional, e
  mpathetic, takes ownership)
2. Issue classification: Is this likely a warranty item, normal wear, or outside scope? E
  xplain reasoning
3. Site visit checklist — what to inspect and document (with photos) when you go back
4. Repair action plan with estimated time and materials
5. Documentation template — what to record for your files (date, issue, resolution, cost
  absorbed vs. billed)
6. Follow-up communication — email to send after the repair confirming the fix and reinfo
  rcing the relationship
7. Prevention note — what to check on future similar projects to avoid this issue

Tone: Professional and solution-oriented. Warranty work isn't a failure — it's how you bu
  ild a reputation that gets referrals.
```

What You'll Get

A complete callback response system — from the first phone call to the follow-up email — that turns warranty issues into opportunities to strengthen client relationships and protect your business.

12 Generate a Weather Delay Reschedule Plan

Use this when weather disrupts your project schedule. A proactive reschedule plan keeps clients informed, crews productive, and prevents the cascade effect where one delay throws off everything.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Create a weather delay reschedule plan for the following situation:

Project: [DESCRIBE — e.g., "Exterior house painting — 2,400 sq ft colonial", "Concrete driveway pour", "Roof tear-off and replacement"]
Original schedule: [e.g., "Monday-Friday this week, crew of 4"]
Weather disruption: [DESCRIBE — e.g., "Rain forecast Tuesday through Thursday", "Extreme heat advisory (105°F) for next 3 days", "Unexpected snow — ground frozen for at least a week"]
Tasks affected: [LIST — e.g., "Exterior primer and first coat", "Concrete pour and finishing", "Shingle installation"]
Tasks that CAN proceed (indoor or weather-independent): [LIST IF ANY — e.g., "Interior trim work", "Electrical rough-in", "Material staging in garage"]
Other active projects that could be affected: [LIST IF ANY — e.g., "Starting a bathroom remodel for another client next Monday"]

Generate a weather delay reschedule plan that includes:
1. Revised project timeline with specific dates and task assignments
2. Crew redeployment plan — who works where during the delay (keep people productive and paid)
3. Client communication email — professional, proactive, explains the delay and new timeline
4. Material protection checklist — what needs to be covered, moved, or stored
5. Cost impact assessment — any additional costs (material storage, crew redeployment, rental extensions) and who absorbs them
6. Cascade check — impact on other scheduled projects and recommended adjustments
7. Go/no-go criteria — specific conditions that must be met before resuming (e.g., "Surface must be dry for 24 hours", "Ground temp above 50°F")

Tone: Organized and proactive. Show the client you have a plan — don't just say "we'll get back to it when the weather clears."
```

What You'll Get

A professional reschedule plan that keeps your crew productive, your clients informed, and your project pipeline from falling apart when weather hits.

Next up: Section 04 — Marketing & Lead Generation.

04

Marketing & Lead Generation

Getting new clients is the lifeblood of your business. These prompts help you build an online pres

1 Google Business Profile Description

Use this to write or update your Google Business Profile — the #1 way local customers find contractors.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a Google Business Profile description for my contracting business. It should be bet
  ween 250-750 characters. Include:
- What we specialize in
- Our service area
- What makes us different from competitors
- A subtle call to action (like "Call for a free estimate")

Tone: Professional but approachable. Write like a confident business owner, not a marketi
  ng agency. Avoid buzzwords like "synergy" or "cutting-edge." Use plain language that a
  homeowner would trust.
```

What You'll Get

A ready-to-paste Google Business Profile description optimized for local search.

2 Monthly Social Media Content Calendar

Use this to plan an entire month of social media posts so you're not scrambling for content ideas.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Create a 30-day social media content calendar for my contracting business. I post on [PLA
  TFORMS — e.g., Facebook, Instagram, NextDoor]. I want to post [NUMBER] times per week.

Mix these content types:
- Before/after project photos (give me captions)
- Tips for homeowners related to our trade
- Behind-the-scenes/team highlights
- Seasonal content relevant to [CURRENT SEASON]
- Subtle promotional posts (not salesy)
```

What You'll Get
A full month of post ideas with written captions you can use immediately.

3 Before/After Project Showcase Post

Use this after completing a project to create a compelling social media post showcasing your work.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a social media post showcasing a recently completed project. Here are the details:

Project type: [e.g., kitchen remodel, bathroom renovation, deck build]
Location: [City/neighborhood — don't include the street address]
Key features: [e.g., custom tile work, quartz countertops, built-in lighting]
Timeline: [How long the project took]
Any interesting challenges we solved: [e.g., "discovered water damage behind the walls and fixed it properly"]
Client reaction: [e.g., "They were thrilled" or a direct quote if you have permission]

Write it as a [Facebook / Instagram / NextDoor] post. Keep it conversational, proud of the work but not braggy. End with a soft call-to-action like inviting people to reach out if they're thinking about a similar project.

Also suggest 5-10 relevant hashtags.
```

What You'll Get
A polished social media post that shows off your work and attracts potential clients.

4 Door Hanger / Flyer Copy

Use this when you're working in a neighborhood and want to market to surrounding homes.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write the text for a door hanger flyer we'll distribute to homes near a job site we're currently working on. Keep it to one side of a door hanger (about 100-150 words max).

The message should:
- Mention we're currently working in their neighborhood (builds trust and urgency)
- Briefly list our top 3 services
```

What You'll Get
Ready-to-print door hanger copy that you can hand to a designer or drop into a Canva template.

5 Website Services Page

Use this to write or rewrite the Services page on your website.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a Services page for my contractor website. Include these services, each as its own
  section:

[LIST YOUR SERVICES — e.g.:
1. Kitchen Remodels
2. Bathroom Renovations
3. Room Additions
4. Deck & Patio Construction
5. Whole-Home Renovations]

For each service, write:
- A compelling 2-3 sentence description of what we do
- 3-4 bullet points highlighting what's included or what makes our approach different
- A brief mention of typical project timelines

End the page with a general call-to-action section encouraging visitors to request a free
   estimate.

Tone: Professional, trustworthy, and clear. Write for homeowners who are researching cont
  ractors — they want to know what they'll get and that they can trust us. Avoid jargon.

Format the output in HTML-ready structure with proper headings.
```

What You'll Get
A complete Services page you can paste into your website builder (or hand to your web designer).

6 Referral Request to Past Clients

Use this to ask happy past clients for referrals — the highest-converting lead source for contractors.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a short, personal email or text message I can send to a past client asking for refe
  rrals. Here are the details:

Client name: [FIRST NAME]
Project we completed: [TYPE OF PROJECT]
How long ago: [e.g., "about 3 months ago"]

The message should:
- Start by checking in on how they're enjoying the finished project
- Naturally transition into mentioning that referrals are the backbone of our business
- Ask if they know anyone who might need similar work
- Offer an incentive if I have one: [e.g., "$100 gift card for any referral that becomes
  a project" or leave blank if no incentive]
- Keep it SHORT — under 100 words for text, under 150 for email
- Sound personal, not like a mass message

Write both a text message version and an email version.
```

What You'll Get

A text message and email you can personalize and send in under a minute.

7 Seasonal Promotion Ideas

Use this to generate promotion ideas tailored to the current season and your trade.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Generate 5 seasonal promotion ideas for my contracting business for [SEASON — e.g., Sprin
  g, Summer, Fall, Winter]. For each promotion:

1. Give it a catchy name
2. Describe the offer (discount, bundle, free add-on, etc.)
3. Explain why it makes sense for this season (connect to homeowner needs)
4. Suggest how to promote it (social media, door hangers, email, Google Business post)
5. Estimate the effort level (Low / Medium / High)

Focus on promotions that drive real inquiries, not just brand awareness. Think about what
   homeowners are already thinking about this time of year and connect our services to th
  ose needs.
```

What You'll Get
Five ready-to-launch seasonal promotion concepts with implementation plans.

8 Email Newsletter for Client List

Use this to write a monthly or quarterly newsletter to stay top-of-mind with past clients and leads.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a short email newsletter for my contracting business. This goes out to past clients
   and people who've requested estimates.

Include these sections:
1. A friendly seasonal greeting (1-2 sentences)
2. A featured recent project with a brief description (I'll add the photo)
   - Project: [DESCRIBE A RECENT PROJECT]
3. One helpful home maintenance tip relevant to [CURRENT SEASON]
4. A mention of any current promotion or availability: [DESCRIBE OR SAY "We have openings
   for new projects starting in [MONTH]"]
5. A simple call to action (reply to this email, call us, forward to a friend)

Keep the total length under 300 words. Tone: friendly, helpful, like a letter from your t
  rusted contractor — not a corporate newsletter. Write in first person.
```

What You'll Get
A complete email newsletter draft ready to send through your email platform.

9 Response to an Online Inquiry / Contact Form Submission

Use this to quickly respond to leads that come in through your website or social media.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a response to an online inquiry from a potential client. Here's what they submitted
  :

Client name: [NAME]
Project they're interested in: [WHAT THEY DESCRIBED]
Any details they provided: [BUDGET, TIMELINE, SPECIFIC REQUESTS — or "minimal details"]
How they found us: [WEBSITE / GOOGLE / SOCIAL MEDIA / REFERRAL / UNKNOWN]
```

What You'll Get
A personalized response you can send within minutes of receiving an inquiry — speed of response is one of the biggest factors in winning the job.

10 Local SEO Blog Post

Use this to create content for your website that helps you rank in local Google searches.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a blog post for my contractor website targeting local homeowners.

Topic: [CHOOSE ONE — e.g., "How Much Does a Kitchen Remodel Cost in [YOUR CITY]?", "5 Signs Your [SYSTEM] Needs Replacement", "How to Choose a Contractor in [YOUR CITY]", "What to Expect During a [PROJECT TYPE]"]

Requirements:
- Length: 600-900 words
- Include the target keyword "[YOUR CITY] + [YOUR SERVICE]" naturally 3-5 times
- Write for homeowners who are researching, not contractors
- Include practical advice they can actually use
- End with a call-to-action mentioning our company and a free estimate offer
- Use subheadings (H2) to break up the content
- Tone: knowledgeable and helpful, like explaining something to a neighbor

This will be posted at [YOUR WEBSITE URL]/blog/
```

What You'll Get
An SEO-optimized blog post that helps your website rank higher in local Google searches and positions you as the local expert.

Next up: Section 05 — Financial & Admin

05

Financial & Admin

Running a contracting business means wearing a lot of hats — bookkeeper, HR manager, office a

1 Categorize Expenses for Tax Prep

Use this when it's time to organize your expenses for your accountant or for tax filing.

```
[PASTE YOUR CONTEXT BLOCK HERE]

I need to categorize my business expenses for tax preparation. Here are my recent expense
  s (paste from bank statement, spreadsheet, or just list them):

[PASTE YOUR EXPENSES — e.g.:
- Home Depot $347.22
- Shell Gas Station $89.50
- Verizon $145.00
- Hilti tool rental $225.00
- Subway $12.45
- GEICO $380.00 (quarterly)
- QuickBooks subscription $35.00
- Lowe's $892.33]

For each expense, categorize it into the appropriate IRS Schedule C category:
- Materials & Supplies
- Vehicle & Fuel
- Equipment & Tool Rental
- Insurance
- Office & Software
- Meals (50% deductible)
- Subcontractor Payments
- Advertising & Marketing
- Other

Present this as a clean table with columns: Date (if provided), Vendor, Amount, Category,
   Notes. Then give me a total for each category at the bottom.

Note: This is for organizational purposes only — I'll verify everything with my accountan
  t.
```

What You'll Get
A neatly categorized expense report you can hand to your accountant, saving hours of sorting through receipts.

2 Business Plan Executive Summary for a Loan Application

Use this when applying for a business loan, line of credit, or equipment financing.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a 1-page executive summary for a business loan application. I'm applying for:

Loan purpose: [e.g., "purchase a new work truck", "expand to a second crew", "buy equipme
  nt", "working capital for larger projects"]
Loan amount: $[AMOUNT]
Current annual revenue: approximately $[AMOUNT]
Years in business: [NUMBER]
Number of employees: [NUMBER]
Key clients or notable projects: [LIST 2-3 IF APPLICABLE]

The executive summary should cover:
1. Company overview (what we do, where, how long)
2. Market opportunity (why demand exists for our services in our area)
3. How the loan will be used and the expected return on investment
4. Our track record and ability to repay
5. Brief growth plan for the next 1-2 years

Tone: confident and professional — this is going to a bank or lender. Focus on numbers an
  d concrete outcomes, not vague promises.
```

What You'll Get
A professional executive summary that makes your loan application stand out and shows lenders you're a serious business.

3 New Employee Onboarding Checklist

Use this when you hire a new crew member, office assistant, or subcontractor to make sure nothing falls through the cracks.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Create a comprehensive onboarding checklist for a new [ROLE — e.g., "crew member", "field
   supervisor", "office manager", "apprentice"]. This person will be:

Start date: [DATE]
Role: [BRIEF DESCRIPTION OF RESPONSIBILITIES]
Reporting to: [WHO]
Pay type: [HOURLY / SALARY] at $[RATE]
Employment type: [W-2 EMPLOYEE / 1099 CONTRACTOR]

Organize the checklist into these categories:

1. **Before Day 1** (paperwork, logistics)
2. **Day 1** (orientation, introductions, safety)
3. **First Week** (training, job shadowing, tool setup)
4. **First Month** (performance check-in, independence milestones)

Include items for:
- Required forms (W-4, I-9, state forms, direct deposit)
- Safety training and PPE
- Tool and equipment assignment
- Company policies to review
- Emergency contact info
- Vehicle/driving requirements if applicable
- Key contacts and communication channels

Format as a checklist with [ ] boxes I can print and check off.
```

What You'll Get

A printable onboarding checklist that ensures every new hire has a professional, organized first experience with your company.

4 Interview Questions for Hiring a Field Supervisor

Use this when you're hiring for any role in your company and want better interview questions than "Tell me about yourself."

```
[PASTE YOUR CONTEXT BLOCK HERE]

Generate 15 interview questions for a [ROLE — e.g., "field supervisor", "lead carpenter",
   "project manager", "office coordinator", "estimator"] position at my contracting compa
  ny.
```

What You'll Get
A structured interview guide that helps you make better hires and avoid costly mistakes.

5 Partnership Proposal for a Complementary Trade

Use this when you want to partner with another contractor (e.g., a plumber partnering with an HVAC company) for referrals or bundled services.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a professional partnership proposal email to a complementary trade contractor. Here are the details:

Their business: [COMPANY NAME], a [THEIR TRADE — e.g., plumbing, electrical, HVAC, landscaping] company in [CITY]
Contact person: [NAME AND TITLE]
How I know them / connection: [e.g., "We've worked on the same job sites", "mutual contact introduced us", "found them online"]

The partnership I'm proposing:
[DESCRIBE — e.g., "mutual referral arrangement where we send each other leads", "bundled service offerings for whole-home renovations", "preferred subcontractor relationship"]

What's in it for them: [e.g., "steady stream of referrals from our projects that need their trade", "our clients trust our recommendations", "we'd feature them on our website"]

Keep the email professional but personable. It should feel like one business owner reaching out to another — not a corporate proposal. Under 250 words. Include a clear call to action (meet for coffee, phone call, etc.).
```

What You'll Get
A professional outreach email that opens the door to partnerships that generate leads for both businesses.

6 Profit & Loss Summary from Project Data

Use this to understand the profitability of a completed project.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Help me create a profit & loss summary for a recently completed project:

Project: [TYPE OF PROJECT — e.g., "Kitchen remodel for the Johnson residence"]
Contract amount: $[TOTAL CLIENT WAS CHARGED]
Change orders: $[ADDITIONAL AMOUNTS, or "none"]

Costs (fill in what you have):
- Materials: $[AMOUNT]
- Labor (crew hours x rate): [HOURS] hours at $[RATE]/hr = $[AMOUNT]
- Subcontractor costs: $[AMOUNT]
- Permits and fees: $[AMOUNT]
- Equipment rental: $[AMOUNT]
- Other costs: $[DESCRIBE AND AMOUNT]

Calculate and present:
1. Total revenue (contract + change orders)
2. Total direct costs (itemized)
3. Gross profit (revenue minus direct costs)
4. Gross margin percentage
5. Estimated overhead allocation (suggest [15-20]% of revenue for a company my size)
6. Net project profit
7. Effective hourly rate (net profit / owner hours spent on project: approximately [HOURS
  ] hours)

Present this as a clean summary table. Then give me a brief analysis: was this project pr
  ofitable? What could be improved next time?
```

What You'll Get
A clear financial picture of each project so you can price future work more accurately and stop leaving money on the table.

7 Vehicle/Equipment Purchase Justification

Use this when you need to justify a major purchase to yourself, a partner, or a lender.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Help me build a business case for purchasing [ITEM — e.g., "a new Ford F-250 work truck",
   "a Bobcat mini excavator", "a commercial-grade table saw", "a cargo trailer"].

Current situation: [e.g., "Our current truck has 180K miles and breaks down frequently",
  "We're renting this equipment 3-4 times per month", "We're subbing out work we could do
```

What You'll Get
A data-driven justification document that takes the emotion out of a big purchase decision and shows the numbers.

8 Annual Business Review and Goal Setting

Use this at the end of the year (or any time) to review your business performance and set goals for the coming year.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Help me create an annual business review and goal-setting document. Here's my data for the past year:

Revenue: approximately $[AMOUNT]
Number of projects completed: approximately [NUMBER]
Average project size: approximately $[AMOUNT]
Biggest project: [DESCRIBE]
Number of employees (end of year): [NUMBER]
Major wins: [LIST 2-3 — e.g., "Landed our first commercial project", "Added a second crew", "Got to 50 Google reviews"]
Biggest challenges: [LIST 2-3 — e.g., "Struggled with cash flow in Q1", "Lost a key employee", "Material costs ate into margins"]
What I want to improve: [LIST 2-3 AREAS]

Create:
1. **Year in Review** — brief narrative of the year (5-6 sentences highlighting key achievements and lessons)
2. **By the Numbers** — clean table of key metrics
3. **What Worked / What Didn't** — two-column summary
4. **Goals for [NEXT YEAR]** — 5 specific, measurable goals with quarterly milestones
5. **Top 3 Priorities for Q1** — the most impactful things to focus on immediately

Keep it to 2 pages max. This should be practical, not aspirational — I want goals I'll actually hit.
```

What You'll Get
A structured annual review that helps you learn from the past year and build a focused plan for growth.

9 Respond to a Client Who's Disputing an Invoice

Use this when a client pushes back on a bill — whether they think a charge is too high, question a line item, or claim something wasn't agreed to. A professional response protects your cash flow and the relationship.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Write a professional response to a client who is disputing an invoice. Here are the details:

Client name: [NAME]
Project: [TYPE AND LOCATION]
Invoice amount: $[AMOUNT]
Amount they're disputing: $[AMOUNT OR "the entire invoice"]

What they're claiming:
[DESCRIBE THEIR OBJECTION — e.g., "They say the tile work took longer than we quoted and they shouldn't have to pay for the extra hours", "They claim we never discussed the permit fee being billed to them", "They think the final amount is higher than the estimate and want an explanation", "They say the work quality doesn't justify the price"]

The facts from our side:
[DESCRIBE WHAT ACTUALLY HAPPENED — e.g., "The tile scope expanded because they changed the layout mid-project — we discussed this on-site on March 5 and they verbally approved the additional cost", "The permit fee was listed as a line item in the original estimate they signed", "The estimate clearly stated 'estimate only, final amount based on actual materials and time'"]

Supporting documentation we have:
[LIST — e.g., "Signed estimate", "Change order signed on 3/5", "Text messages confirming scope change", "Photos of the additional work", "Original contract with payment terms"]

Our goal: [CHOOSE: Collect the full amount / Negotiate a reasonable compromise / Offer a small discount to preserve the relationship / Firmly stand our ground with documentation]

Write a response that:
1. Acknowledges their concern without being defensive
2. Clearly explains the charges with reference to documentation
3. Provides a specific breakdown of the disputed amount
4. Proposes a resolution aligned with our goal
5. Maintains professionalism — this email could end up in front of a mediator or judge
6. Ends with a clear next step and timeline

Tone: Professional, firm but respectful. We want to get paid, but we also want to handle this in a way we'd be proud of if anyone read it.
```

What You'll Get

A professional, well-structured response that addresses the dispute with facts and documentation, proposes a clear resolution, and protects you if the situation escalates.

10 Bid/No-Bid Decision Analysis

Use this before investing time in a detailed estimate for a potential project. Not every lead is worth pursuing — this prompt helps you evaluate whether a project is a good fit before you spend hours on a proposal.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Help me decide whether to bid on the following project opportunity:

Project details:
- Type: [e.g., "Full kitchen remodel", "Commercial tenant buildout", "New deck construction"]
- Location: [CITY/AREA — note drive time from our base]
- Estimated project value: $[ROUGH RANGE]
- Client type: [HOMEOWNER / PROPERTY MANAGER / GENERAL CONTRACTOR / COMMERCIAL / GOVERNMENT]
- Timeline: [WHEN THEY WANT TO START AND FINISH]
- How the lead came in: [REFERRAL / WEBSITE / COLD CALL / ONLINE AD / BIDDING PLATFORM]

What I know so far:
[SHARE ANY OBSERVATIONS — e.g., "Client seems very budget-focused and is getting 5+ bids", "They've already fired one contractor mid-project", "Great referral from our best client", "It's a type of project we haven't done before", "They want to start in 2 weeks and we're already booked through April"]

Our current situation:
- Current workload: [e.g., "Two active projects, crew is at 80% capacity"]
- Cash flow: [e.g., "Healthy", "Tight — could use the deposit", "Waiting on two big payments"]
- Crew availability: [e.g., "Would need to hire a sub for part of it", "Our crew can handle it"]
- How busy is our pipeline? [e.g., "3 other proposals out", "Slow month, need the work"]

Analyze this opportunity using these criteria:
1. **Profitability** — Can we make our target margin (typically [25-35]%) on this project?
2. **Fit** — Does this match our expertise, preferred project type, and service area?
3. **Client risk** — Any red flags (budget shoppers, unrealistic timeline, difficult personality, legal issues)?
4. **Opportunity cost** — What are we saying no to if we commit to this?
5. **Strategic value** — Does this open doors (new market, portfolio piece, referral sour
```

What You'll Get

A structured analysis that takes the emotion out of bidding decisions. Stop saying yes to projects that lose money or cause headaches, and start focusing your time on the opportunities that actually grow your business.

11 Prepare a Year-End Tax Prep Summary for Your Accountant

Use this at tax time (or monthly if you're smart about it). Give your accountant a clean summary instead of a shoebox of receipts — you'll save on their hourly rate and catch deductions you'd otherwise miss.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Prepare a year-end tax preparation summary for my contracting business with the following
   information:

Tax year: [YEAR]
Business structure: [CHOOSE: Sole Proprietor / LLC / S-Corp / Partnership]
Accounting method: [CHOOSE: Cash basis / Accrual basis]

Revenue summary:
- Total invoiced: $[AMOUNT]
- Total collected: $[AMOUNT]
- Outstanding receivables: $[AMOUNT]
- Number of projects completed: [NUMBER]
- Largest single project: $[AMOUNT] — [BRIEF DESCRIPTION]

Expense categories (provide totals for each that applies):
- Materials & supplies: $[AMOUNT]
- Subcontractor payments: $[AMOUNT]
- Vehicle expenses (miles driven for business): [MILES] at [RATE] OR actual costs: $[AMOU
  NT]
- Tools & equipment purchased: $[AMOUNT] (list items over $2,500: [LIST])
- Insurance (general liability, workers comp, vehicle): $[AMOUNT]
- Office/admin (phone, software, internet): $[AMOUNT]
- Rent (office, shop, or storage): $[AMOUNT]
- Marketing & advertising: $[AMOUNT]
- Professional services (accountant, lawyer): $[AMOUNT]
- Fuel: $[AMOUNT]
- Licenses & permits: $[AMOUNT]
- Continuing education / training: $[AMOUNT]
- Other: [LIST WITH AMOUNTS]

Additional info:
- Did you purchase any equipment over $10,000? [YES/NO — if yes, list items for Section 1
  79 deduction consideration]
- Did you hire any new employees this year? [YES/NO — number]
```

What You'll Get
A professional tax prep package that makes your accountant's job easier (saving you money on their bill), ensures you don't miss deductions, and keeps your records audit-ready.

12 Document an Insurance Claim or Property Damage Incident

Use this when something goes wrong on a job site — property damage, equipment theft, vehicle accident, or injury. Proper documentation in the first 24 hours is the difference between a covered claim and a denied one.

```
[PASTE YOUR CONTEXT BLOCK HERE]

Create comprehensive insurance claim documentation for the following incident:

Incident type: [CHOOSE: Property damage to client's home / Equipment theft / Vehicle accident / Worker injury / Third-party property damage / Storm/weather damage to active job site / Vandalism]
Date and time: [DATE, TIME]
Location: [JOB SITE ADDRESS]
Project: [BRIEF DESCRIPTION of the job being performed]

What happened:
[DESCRIBE IN DETAIL — e.g., "While removing old shingles, a crew member accidentally dropped a bundle that went through the client's greenhouse roof", "Arrived Monday morning to find the job trailer broken into — generator, two nail guns, and a miter saw stolen", "Excavator hit an unmarked gas line during trenching"]

People involved:
- Crew members present: [NAMES AND ROLES]
- Client present? [YES/NO]
- Witnesses: [NAMES AND CONTACT INFO IF AVAILABLE]
- Injuries: [DESCRIBE ANY, or "None"]

Damage assessment:
- What was damaged: [DESCRIBE]
- Estimated cost to repair/replace: $[ESTIMATE]
- Photos taken? [YES/NO — how many, what they show]
- Can work continue? [YES/NO — explain]

Insurance info:
- Policy type that applies: [CHOOSE: General Liability / Workers Comp / Commercial Auto / Inland Marine (equipment) / Builder's Risk]
- Insurance carrier: [NAME]
- Policy number: [NUMBER if known]

Generate a complete incident documentation package that includes:
```

What You'll Get

A complete incident documentation package that protects your business when filing insurance claims. Proper documentation in the first 24 hours dramatically increases the chance of full claim coverage.

Next up: Bonus — SOP Templates

B

Bonus: SOP Templates

Standard Operating Procedures sound corporate, but they're actually the secret weapon of contractors who scale. When your process is written down, anyone on your team can follow it — and clients get a consistent, professional experience every time.

These three SOPs cover the most critical moments in any project: when a new lead comes in, when a project kicks off, and when a project wraps up. Customize them to fit your business, print them out, and put them where your team can see them.

1 New Client Intake Process

Purpose: Ensure every new lead gets a fast, professional, and consistent response — no matter who on your team handles it.

Trigger: A new lead contacts us via phone, email, website form, or social media.

Step 1: Initial Response (Within 1 Hour)

- ■ Log the lead in our tracking system (CRM, spreadsheet, or notebook): name, phone, email, source, project type
- ■ Respond within 1 hour during business hours (fastest response wins the job)
- ■ Use this response template:

> **Example**
> Hi [NAME], thanks for reaching out to [COMPANY NAME]! I'd love to learn more about your [PROJECT TYPE] project. I have a few quick questions, and then we can set up a time for me to come take a look. When works best for a brief call — [suggest two specific times]?

- ■ If the lead came from a referral, mention the referrer by name in your response

Step 2: Discovery Call (5-10 Minutes)

Before scheduling a site visit, gather these basics:

- ■ Full name and property address
- ■ Type of project and scope (what do they want done?)
- ■ Approximate budget range (if they'll share)
- ■ Desired timeline (when do they want to start? Any deadlines?)
- ■ How they found us (for marketing tracking)
- ■ Decision-making process (are they getting multiple bids? Who else is involved in the decision?)

Step 3: Schedule Site Visit

■ Confirm date and time (offer 2-3 options)
■ Send calendar invite or confirmation text with:
• Date and time
• Your name and phone number
• What to expect during the visit (15-30 minutes, we'll walk through the project, take measurements, discuss options)
• Ask them to have any inspiration photos or must-haves ready
■ Set a reminder for yourself the day before

Step 4: Site Visit

■ Arrive on time or 5 minutes early
■ Bring: tape measure, notepad, camera/phone, business cards
■ Walk through the project area with the client
■ Take notes on scope, measurements, any special conditions
■ Take photos (with permission) for estimating
■ Discuss general timeline and approach (don't commit to price on-site)
■ Set expectations: "I'll have a detailed estimate to you by [DATE — within 48 hours max]"
■ Leave a business card and any printed materials

Step 5: Follow-Up

■ Send a thank-you text within 2 hours: "Great meeting you today, [NAME]. I'm putting together your estimate now and will have it to you by [DATE]. Feel free to reach out if any other questions come up!"
■ Prepare and send the estimate by the promised date
■ If no response within 3 days, follow up with Prompt 09 from Section 01

2 Project Kickoff

Purpose: Set every project up for success with clear communication, proper documentation, and a professional first impression.

Trigger: Client signs the contract and pays the deposit.

Step 1: Internal Preparation (Before Crew Arrives)

■ Create a project folder (physical and/or digital) with:
• Signed contract
• Approved estimate and any change orders
• Architectural plans or sketches
• Permit documentation
• Client contact info and communication preferences
■ Order materials (use Prompt 06 from Section 03 for material checklists)
■ Assign crew lead and team members
■ Schedule subcontractors for their phases

- ■ Verify all permits are pulled and posted
- ■ Confirm start date with the client in writing

Step 2: Client Kickoff Communication (1-2 Days Before Start)

Send the client a kickoff email or text covering:

- ■ Confirmed start date and approximate start time
- ■ Who will be on-site (crew lead name and phone number)
- ■ What to expect on Day 1 (setup, material delivery, etc.)
- ■ Access needs (keys, gate codes, pets, parking)
- ■ Approximate work hours (e.g., "Our crew typically works 7:30 AM to 4:00 PM")
- ■ How we'll communicate during the project (weekly updates, preferred method)
- ■ What they should remove or prepare before we arrive
- ■ Where to direct questions or concerns (your number or the crew lead's)

Step 3: Crew Kickoff Briefing (Morning of Day 1)

Brief your crew before they step on the client's property:

- ■ Walk through the full scope of work
- ■ Review the project schedule and milestones
- ■ Discuss any site-specific conditions or challenges
- ■ Review safety requirements for this project
- ■ Clarify client expectations and communication rules:
- • Be polite and professional at all times
- • Don't make promises about scope, timeline, or cost
- • Direct all client questions to [crew lead / you]
- • Clean up at the end of every day
- ■ Assign Day 1 tasks to each team member

Step 4: Day 1 On-Site

- ■ Set up site protection (drop cloths, floor protection, dust barriers)
- ■ Establish a materials staging area
- ■ Introduce the crew lead to the client (if not already done)
- ■ Confirm access, parking, bathroom, and break area logistics
- ■ Start work per the plan
- ■ End-of-day cleanup: leave the site as clean as possible
- ■ Send the client a brief Day 1 update: "Day 1 complete! Here's what we accomplished today: [brief summary]. Everything is on track. Tomorrow we'll be [next day's focus]."

3 Project Closeout

Purpose: Close every project professionally, ensure client satisfaction, and set the stage for reviews, referrals, and repeat business.

Trigger: All construction work is substantially complete.

Step 1: Internal Punch List

Before the client walkthrough:

- ■ Crew lead conducts a thorough walkthrough of ALL work
- ■ Document any remaining items (use Prompt 03 from Section 03 for AI-assisted punch list generation)
- ■ Complete all punch list items
- ■ Clean the entire work area thoroughly — leave it better than you found it
- ■ Remove all tools, materials, and debris
- ■ Take final "after" photos for your portfolio (before furniture goes back)

Step 2: Client Final Walkthrough

- ■ Schedule the walkthrough at a time when the primary decision-maker can attend
- ■ Walk through every element of the scope of work together
- ■ Demonstrate anything that requires explanation (new fixtures, systems, controls, etc.)
- ■ Document any items the client wants addressed
- ■ Get verbal confirmation of satisfaction
- ■ If there are remaining items: set a specific date for completion and follow through

Step 3: Final Documentation

Provide the client with a project completion packet:

- ■ Final invoice with all charges itemized
- ■ Warranty information (your workmanship warranty terms + manufacturer warranties)
- ■ Maintenance tips for the work we performed (e.g., "For your new hardwood floors, we recommend...")
- ■ Permit close-out confirmation (if applicable)
- ■ All relevant product manuals, paint codes, tile batch numbers, etc.
- ■ Before/after photos (clients love these)

Step 4: Final Payment

- ■ Send final invoice with clear payment terms
- ■ Offer payment options (check, ACH, card)
- ■ Confirm receipt of payment
- ■ If a lien waiver is required, provide it upon final payment

Step 5: Relationship Building

Within 1 week of project completion:

- ■ Send a thank-you email (use Prompt 06 from Section 02 — project complete handoff)
- ■ Wait 3-5 days, then send a Google review request (use Prompt 07 from Section 02)
- ■ Add the client to your "past clients" list for future newsletters and referral requests
- ■ Schedule a 90-day follow-up reminder to check in

At the 90-day mark:

- Send a brief check-in: "Hi [NAME], just wanted to check in on the [PROJECT]. How's everything holding up? If anything comes up, we're always here."
- Include a referral request if appropriate (use Prompt 06 from Section 04)

How to Customize These SOPs

These templates are starting points. To make them yours:

1. **Print them out** and keep them where you and your team can reference them
2. **Walk through each one** on your next project and note what you'd add or change
3. **Update them** after every few projects — your process will improve each time
4. **Train your team** on them — the whole point is consistency, even when you're not on-site
5. **Use AI to customize further** — paste any SOP into your AI tool and ask it to adapt it for your specific trade, team size, or project types

That's the complete Contractor's AI Toolkit! Remember: even if you only use 5 prompts regularly, you've already gotten your money's worth many times over. Start with the ones that solve your biggest daily headache, and expand from there.

Questions or feedback? Reach out at chris@gobehindtheproduct.com

Learn more at behindtheproduct.pro