

TAKE BACK YOUR TIME

WITH AI

PRACTICAL TOOLS YOU CAN USE
MONDAY MORNING



Midwest Insulation
Contractors Association

Presented by **Chris Sund**

ChrisSund.com





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Uniti Med, GQR Healthcare, & Nebula



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Vice President, NATHO Board of Directors



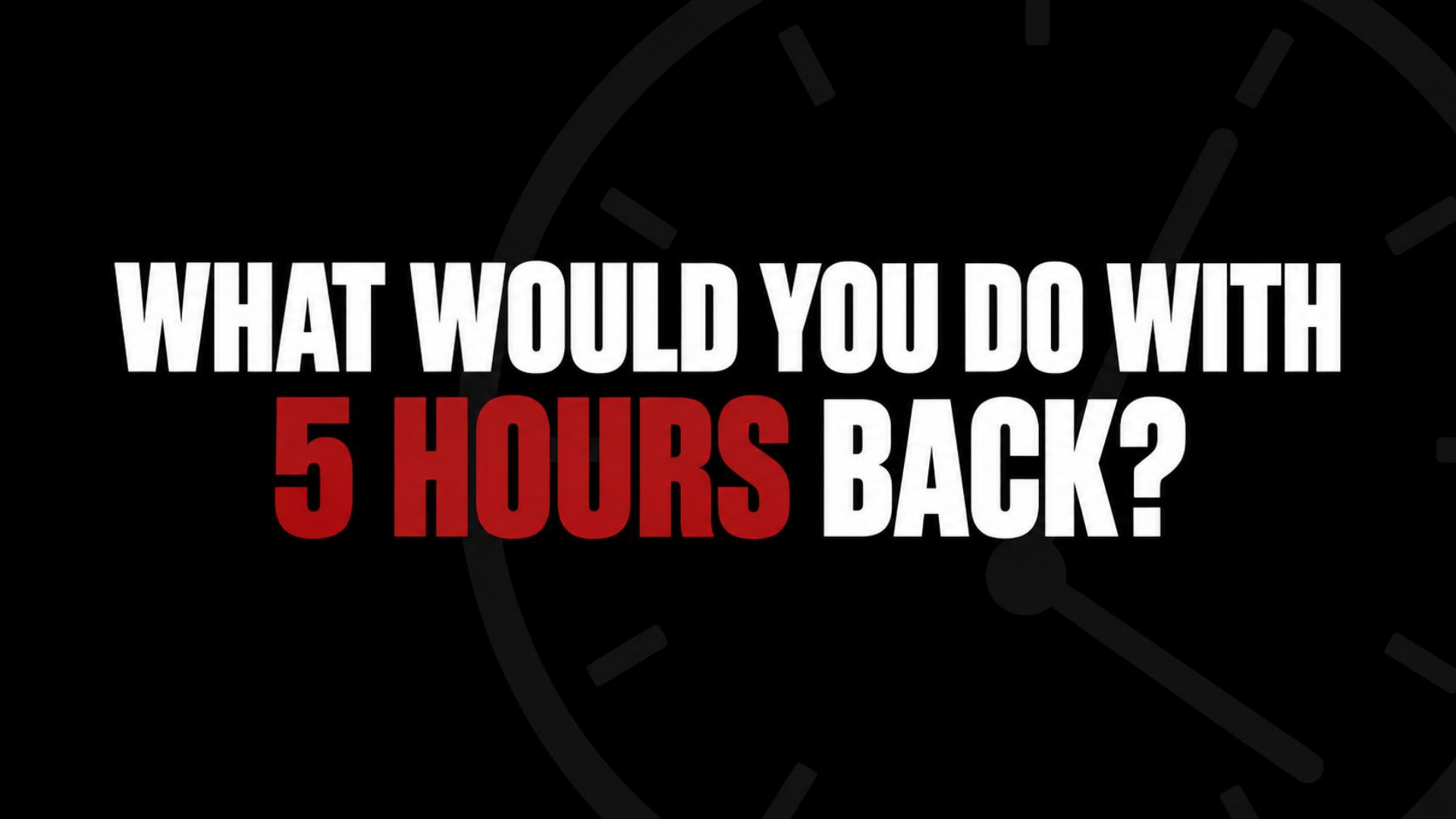
Active member, NAHCR Membership Committee



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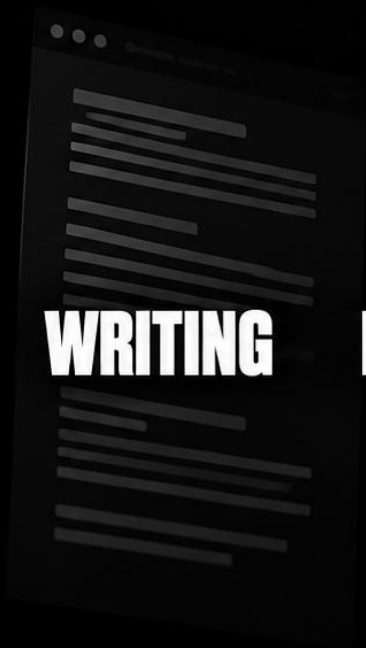


**WHAT WOULD YOU DO WITH
5 HOURS BACK?**

WHERE DOES YOUR **TIME** GO?



SEARCHING



WRITING



FOLLOWING UP



ORGANIZING



REPEATING

WHERE AI CAN HELP

01 FIND REVENUE

02 WIN WORK

03 STRENGTHEN
YOUR WEBSITE

04 CREATE
MARKETING

05 ORGANIZE
OPERATIONS

06 BUILD REPEATABLE
PROCESSES

TELL AI FIVE THINGS

1

WHO IS IT?



Act as an estimator.

2

WHAT SHOULD IT DO?



Draft a quote.

3

WHAT SHOULD IT KNOW?



Use these job details.

4

WHAT SHOULD IT MAKE?



Create a one-page PDF.

5

WHAT MUST IT AVOID?



Do not invent prices.

ROLE + TASK + DETAILS + FORMAT + GUARDRAILS

IF THE FIRST RESULT IS WEAK, ADD THE DETAIL YOU LEFT OUT.

HOW EACH EXAMPLE WORKS

1 THE TASK



2 WHAT WE GIVE AI



3 WHAT AI PRODUCES



4 WHAT WE CHECK



LOOK FOR ONE TASK YOU CAN USE **MONDAY.**

SECTION 01

FIND REVENUE

Find opportunities and choose the next action.

01

WHERE **WORK** SHOWS UP FIRST



BID PLATFORMS



PUBLIC PROJECTS



PERMITS & PLANNING



EXPANSION NEWS



RECOMMENDATION REQUESTS



CONTRACTOR DIRECTORIES

FIND THE **SIGNAL** BEFORE THE BID



THE PROMPT THAT **FOUND THE WORK**

Act as a business development researcher for a commercial mechanical insulation contractor.

Find current, publicly available project opportunities and early indicators of future work in Nebraska, Iowa, Kansas, Missouri, and South Dakota.

Focus on public bids, school and hospital projects, industrial expansions, permits and planning agendas, facility announcements, and visible contractor requests.

For each result, provide:

- Project and location
- Current stage and date
- Why it may need our services
- Public contact and source
- Recommended next step

Separate the results into:

READY TO PURSUE

EARLY OPPORTUNITY SIGNALS

Verify every result with a public source. Clearly label any inference. Do not invent projects, dates, contacts, or scope.

FULL PROMPT IN THE FIELD GUIDE

REAL OPPORTUNITIES. PUBLIC INFORMATION.

Project and location	Type, stage, and date	Why it may need mechanical insulation	Public contact or agency	Recommendation
USGS EROS chilled and condenser water piping — Sioux Falls, SD	Federal construction RFQ, updated Sept. 23; offers due Oct. 20, 2026, 5 p.m. CDT. Site visit Oct. 6.	Inference: Replacement of chilled-water and condenser-water piping is a strong potential fit for pipe insulation. The binding scope must be checked in the statement of work.	USGS; contracting contact Kimberly Schneider, krschneider@usgs.gov . The solicitation is a total small-business set-aside.	Download insulation eligible m
Technical Services Complex HVAC Improvements — Ames, IA	City construction bid; bids due Oct. 28, 2026, 2 p.m. The city's public notice lists the project but does not show its posting date.	Inference: HVAC improvements may involve insulated duct or piping; the notice alone does not establish the insulation scope.	City of Ames City Clerk's Office.	Obtain the identify th work. A
IWCC Student Center Kitchen HVAC Replacement — Council Bluffs, IA	College HVAC project; bids due Oct. 6, 2026, 2 p.m. The public planroom lists replacement of four makeup-air units and six grease-exhaust fans; its posting date is not shown.	Inference: Connections to replacement air units may require duct insulation. The listed equipment scope does not itself confirm insulation work.	Lisa Lewis is listed by the project planroom; bid documents are available through A&D Technical Supply.	Get the pl connectio Projec
Iowa DOT Ames Materials Lab HVAC Update — Ames, IA	State request for bids, posted Sept. 11; closes Oct. 5, 2026, 1 p.m.	Inference: An HVAC update could include insulated duct or piping, but the state's public summary does not define that scope.	Teri Schulz, Iowa DOT purchasing agent, teri.schulz@iowadot.us , 515-239-1431.	Ask for th there is ar bidopg

AI searched. You decide what is worth pursuing.

GIVE CUSTOMERS A **REASON TO RESPOND**

73%

of B2B buyers actively avoid suppliers
who send irrelevant outreach.



A SPECIFIC **PROJECT.** A RELEVANT **MESSAGE.** A CLEAR **NEXT STEP.**

Source: Gartner, 2025 survey of 632 B2B buyers

ONE OPPORTUNITY. ONE **NEXT MOVE.**

USGS EROS CHILLED + CONDENSER WATER PIPING

Sioux Falls, South Dakota
Federal construction RFQ
Offers due October 20, 2026

WHY IT MAY FIT

Replacement of chilled-water and condenser-water piping may require pipe insulation.

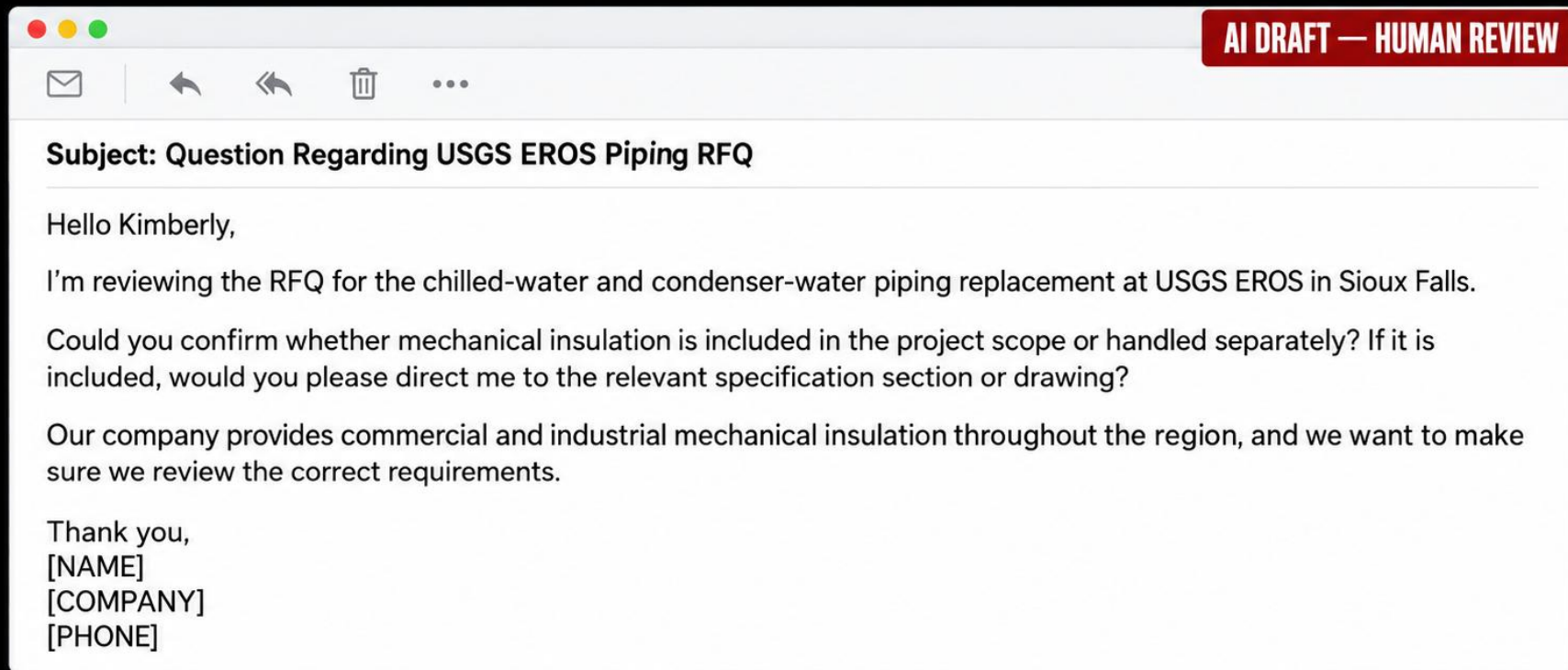
VERIFY THE SCOPE BEFORE PURSUING

WHAT HAPPENS NEXT

- 1** OPEN THE ORIGINAL SOLICITATION
- 2** CONFIRM INSULATION IS IN THE SCOPE
- 3** CHECK ELIGIBILITY AND DEADLINES
- 4** CONTACT THE AGENCY OR PREPARE THE RESPONSE

A LIST DOES NOT CREATE REVENUE. THE **NEXT ACTION DOES.**

FROM PUBLIC LEAD TO **FIRST CONTACT**



SPECIFIC. RELEVANT. **EASY TO ANSWER.**

SECTION 02

WIN WORK

Turn a customer request into a useful response.

TAKE BACK YOUR TIME WITH AI

02

**RESPOND FASTER.
WIN MORE WORK.**



HOW QUICKLY DO YOU RESPOND TO A NEW REQUEST?

- ☐ **WITHIN AN HOUR**
- ☐ **THE SAME DAY**
- ☐ **WITHIN A FEW DAYS**
- ☐ **IT DEPENDS WHO SEES IT**



YOUR RESPONSE IS PART OF THE FIRST IMPRESSION

“If I have to **FOLLOW UP TWICE**,
I eliminate you from
consideration.”

One industrial purchasing decision-maker



ACKNOWLEDGE THE REQUEST. ASK WHAT IS MISSING. SET THE NEXT STEP.

Source: Thomas, 2021 survey of more than 400 industrial buyers

WHAT DO YOU **NEED TO KNOW?**

SUBJECT: QUOTE REQUEST

Hi,

We're renovating a food processing facility in Des Moines and need pricing for mechanical insulation. We hope to begin next month.

Can you send us an estimate?

Thanks,
Jordan

THE PROMPT: WHAT DO WE NEED?

Act as an experienced estimator and customer service manager for a commercial mechanical insulation contractor.

Review the customer's quote request below.

FIRST, IDENTIFY:

- Information missing from the request
- Questions required before pricing the work
- Anything that needs a drawing, specification, site visit, or company decision

THEN, DRAFT:

- A professional customer response
- Clear questions in a logical order
- A simple next step, such as a call or site visit

Do not invent scope, quantities, materials, pricing, availability, or deadlines. Keep the response helpful and concise.

CUSTOMER REQUEST:

[PASTE THE EMAIL HERE]

AI FINDS THE GAPS. YOUR TEAM CONFIRMS THE JOB.

AI FOUND THE SAME GAPS

MISSING INFORMATION

- Exact systems and areas
- Drawings and specifications
- Pipe or duct sizes and quantities
- Required material and thickness
- Site conditions and access
- Bid deadline and project schedule
- Contact for a site visit

DRAFT RESPONSE

Subject: Information Needed for Your Estimate

Hi Jordan,

Thank you for reaching out. We would be glad to review the project.

To prepare an accurate estimate, could you send the drawings and specifications and confirm the systems being insulated, approximate quantities, required materials, project address, bid deadline, and expected schedule?

If it is easier, we can schedule a short call or site visit to review the scope.

Thank you,
[NAME]

THE RESPONSE IS READY. THE ESTIMATE **WAITS FOR FACTS.**

THE PROMPT: **BUILD THE QUOTE**

Using the approved information and company branding provided, create a professional customer quote.

USE ONLY THE APPROVED:

- Customer and project information
- Scope of work
- Quantities and pricing
- Company terms and payment requirements
- Logo, colors, and contact information

INCLUDE:

- Base scope and total price
- Clearly labeled optional add-ons
- Assumptions and exclusions
- Schedule or estimated timing
- Payment terms and expiration date
- Customer approval section

Do not calculate, change, or invent pricing, quantities, contract terms, technical requirements, or company capabilities.

Create the finished quote as a polished PDF.

AI BUILDS THE DOCUMENT. YOUR COMPANY APPROVES THE DEAL.

USE IN CLAUDE

FROM APPROVED DETAILS TO A **FINISHED PDF**



SUMMIT
MECHANICAL INSULATION



PROJECT QUOTE

Customer: Prairie Foods Processing
Project: Des Moines Facility Renovation
Quote: SMI-2026-104
Valid Through: October 31, 2026

BASE SCOPE

Mechanical insulation per approved scope
APPROVED SAMPLE PRICE: \$18,750

OPTIONAL SERVICES

PVC jacketing upgrade: \$3,200
Post-installation inspection report: \$850

ASSUMPTIONS + EXCLUSIONS

See approved project notes

TERMS

30% deposit
Balance due within 30 days

ACCEPTANCE

Customer signature and date

Customer Signature

Date

READY FOR REVIEW



COMPANY BRANDING



APPROVED SCOPE + PRICE



CLEAR OPTIONS

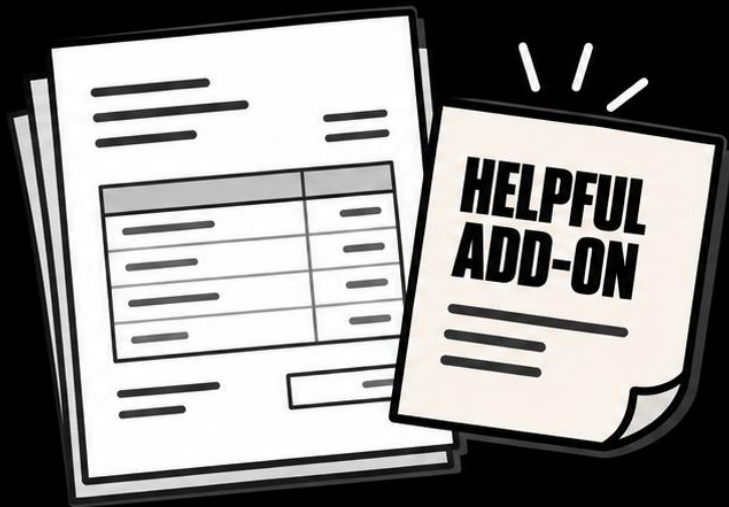


TERMS + SIGNATURE

THE BLANK PAGE IS GONE. **YOUR REVIEW STILL MATTERS.**

CLAUDE OUTPUT

WHAT **ELSE** COULD THIS CUSTOMER **NEED?**



**NOT A HIDDEN
SURPRISE**

ONE REQUEST. SIX POSSIBLE OUTPUTS.



HOW LONG WOULD THIS NORMALLY TAKE?

SECTION 03

STRENGTHEN YOUR WEBSITE

Help customers understand your business and take the next step.

TAKE BACK YOUR TIME WITH AI

CAN THE RIGHT CUSTOMER FIND YOU?

LOCAL CUSTOMERS

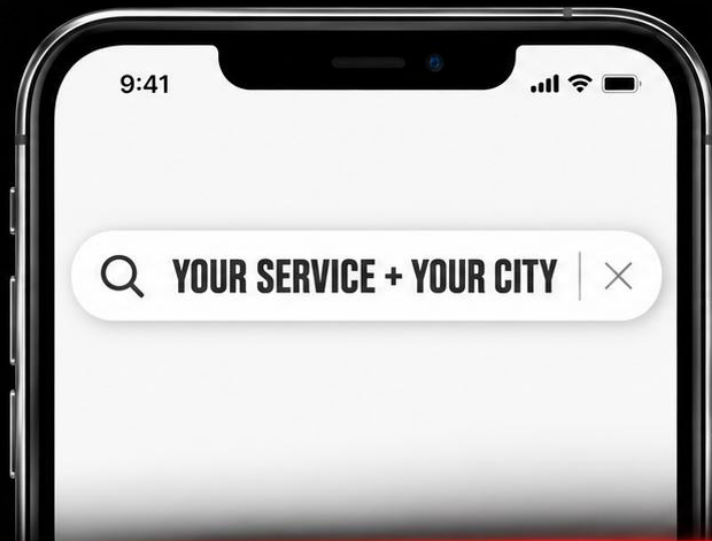
- ☐ GOOGLE BUSINESS PROFILE
- ☐ BING PLACES
- ☐ APPLE BUSINESS CONNECT
- ☐ YELP
- ☐ NEXTDOOR

GENERAL CONTRACTORS & OWNERS

- ☐ THE BLUE BOOK
- ☐ CONSTRUCTCONNECT
- ☐ PLANHUB
- ☐ BUILDINGCONNECTED
- ☐ LOCAL BUILDERS EXCHANGES
- ☐ TRADE ASSOCIATION DIRECTORIES

AUDIENCE EXERCISE

CAN CUSTOMERS **FIND YOU?**



1. DO YOU APPEAR?

2. WHAT DO THEY SEE?

**3. CAN THEY REQUEST
A QUOTE?**



TAKE OUT YOUR PHONE. SEARCH YOUR BUSINESS NOW.

WHAT DOES THE CUSTOMER FIND?



mechanical insulation contractor Omaha

PUBLICLY **VISIBLE**

- ✓ Company website
- ✓ LinkedIn company page
- ✓ Procore contractor profile
- ✓ Contractor directories

PROOF WE **FOUND**

- ✓ Omaha location
- ✓ Commercial + industrial services
- ✓ More than 75 years of experience
- ✓ Trained union workforce

CHECK **LIVE**

- ? Recent project photos
- ? Customer testimonials
- ? Clear service pages
- ? Easy quote request
- ? Consistent company information

BEING LISTED GETS YOU FOUND. PROOF HELPS YOU GET CALLED.

PUBLIC EXAMPLE: MIDWEST INSULATION SERVICES, OMAHA

WHAT DID YOU NOTICE?



WHAT SURPRISED YOU?



WHAT WAS DIFFICULT TO FIND?



WHAT WOULD YOU IMPROVE FIRST?

MAKE IT EASIER TO **TRUST** YOU



YOUR CUSTOMER IS CHECKING YOU OUT

73%

of industrial buyers paid close attention
to a supplier's website when evaluating them.



CAN THEY SEE WHAT YOU DO, WHY TO TRUST YOU, AND HOW TO REACH YOU?

Source: Thomas, 2019 survey of 266 industrial buyers

The background features a collage of images related to home renovation. On the left, there are three overlapping photographs of modern houses with large windows and patios. In the center, a testimonial card is visible with a quote in cursive and five stars at the bottom. On the right, there is a document titled "ESTIMATE" with several lines for text. The entire scene is set against a dark, textured background.

WHAT DOES A CUSTOMER NEED TO SEE BEFORE THEY **TRUST YOU?**

CALL IT OUT. THERE ARE NO WRONG ANSWERS.

THE 10-SECOND WEBSITE TEST



SERVICES ▾ MARKETS SAFETY CAREERS ABOUT US CONTACT US



OUR SERVICES

Since 1949, Gagnon has been an industry leader in industrial and commercial specialty services, offering insulation, scaffolding, refractory, fireproofing and other specialty projects. With offices across the country and more than 250 employees in the field, Gagnon has the **local resources** and **national reputation** to complete your project.

CAN I TELL...

- 1 WHAT THEY DO?
- 2 WHO THEY SERVE?
- 3 WHY I SHOULD TRUST THEM?
- 4 WHAT I SHOULD DO NEXT?

THE CUSTOMER **SHOULD NOT HAVE TO WORK** TO UNDERSTAND YOU.

THE PROMPT: REVIEW IT LIKE A CUSTOMER

Act as a prospective customer looking for a commercial contractor.

Review this website from the customer's point of view:

[PASTE WEBSITE LINK]

ANSWER:

- What does this company do?
- Who does it serve?
- What proof makes it credible?
- What is difficult to understand or find?
- Is the next step obvious?

THEN PRIORITIZE:

The five improvements most likely to increase qualified inquiries.

For each improvement, explain:

- What should change
- Why it matters to the customer
- The expected business value
- The easiest first action

Use only information visible on the website. Do not invent services, projects, testimonials, qualifications, or results.

DO NOT ASK FOR 50 IDEAS. ASK FOR THE FIVE THAT MATTER MOST.

RUN IN CHATGPT

AI **PRIORITIZED** THE WORK

- 1 ADD A CLEAR HOMEPAGE HEADLINE + QUOTE BUTTON** **HIGH**
Tell customers what Gagnon does and give them an immediate next step.
- 2 SHOW COMPLETED PROJECTS** **HIGH**
Add case studies with the customer problem, work completed, photos, and result.
- 3 PUT PROOF NEXT TO THE CLAIMS** **HIGH**
Place safety credentials, experience, and specific evidence where trust decisions happen.
- 4 MAKE LOCAL PAGES EASIER TO FIND** **MEDIUM**
Help customers quickly reach the services and team closest to their project.
- 5 REPEAT THE QUOTE ACTION AFTER PROOF** **MEDIUM**
Ask for the inquiry after customers see services, experience, and completed work.

THE GOAL IS NOT A PRETTIER WEBSITE. THE GOAL IS MORE QUALIFIED INQUIRIES.

THE PROMPT: IMPROVE THE **FIRST SCREEN**

Rewrite only the first screen of this contractor's homepage.

The customer should immediately understand:

- What the company does
- Who it serves
- Why it is credible
- What to do next

USE THESE VERIFIED FACTS:

- Industrial and commercial specialty contractor
- Insulation, scaffolding, refractory, and fireproofing
- Serving customers since 1949
- More than 250 field employees
- Multiple regional locations

CREATE:

1. One clear headline
2. One supporting sentence
3. One primary call-to-action button
4. One secondary call-to-action
5. One short credibility line

Use plain language. Do not invent projects, customers, statistics, certifications, guarantees, or results.

ONE SMALL WEBSITE CHANGE CAN REMOVE A BIG CUSTOMER QUESTION.

RUN IN CHATGPT

THE SAME WEBSITE. A **CLEARER FIRST SCREEN.**

[SERVICES ▾](#)[MARKETS](#)[SAFETY](#)[CAREERS](#)[ABOUT US](#)[CONTACT US](#)

INDUSTRIAL + COMMERCIAL SPECIALTY SERVICES

Insulation, scaffolding, refractory, and fireproofing
backed by more than 75 years of experience and
over 250 field employees.

[REQUEST A QUOTE](#)[EXPLORE SERVICES](#)

SERVING CUSTOMERS SINCE 1949 • MULTIPLE REGIONAL LOCATIONS

AI DRAFT

NOW THE CUSTOMER KNOWS WHAT THEY DO AND **WHAT TO DO NEXT.**

WHAT WOULD YOU **CHANGE FIRST** ON YOUR **WEBSITE?**



TAKE 30 SECONDS. SHARE ONE IMPROVEMENT.

SECTION 04

CREATE MARKETING

Turn one completed project into useful content.

TAKE BACK YOUR TIME WITH AI

04

WHAT **FINISHED JOB** COULD YOU TURN INTO **MARKETING?**



THINK OF ONE PROJECT WITH PHOTOS AND A CLEAR RESULT.

BE KNOWN **BEFORE** THEY NEED YOU

95%

of B2B purchases went to a vendor
on the buyer's Day One shortlist.



SHOW YOUR WORK. MAKE YOUR CAPABILITIES EASY TO REMEMBER.

Source: 6sense, 2025 B2B Buyer Experience Report

ONE FINISHED JOB. FIVE MARKETING ASSETS.

WHAT YOU ALREADY HAVE

PROJECT PHOTOS

Unit 2 - Insulation
- 6" chilled water
- Completed 4/12
- No issues
- Good access
- Owner happy with craftsmanship

FIELD NOTES

Great job
by your team.
The piping looks
excellent.

CUSTOMER COMMENT

WHAT AI CAN HELP CREATE

COMMERCIAL INSULATION PROJECT

WEBSITE PROJECT PAGE

GOOGLE BUSINESS POST



LINKEDIN POST



Hi,



CUSTOMER EMAIL



SALES SHEET

STOP STARTING FROM ZERO.

THE PROMPT: TURN **ONE PROJECT INTO FIVE**

Act as a marketing writer for a commercial contractor.

Using the approved project notes, photos, and customer comment provided, create:

1. **WEBSITE PROJECT PAGE**
2. **GOOGLE BUSINESS POST**
3. **LINKEDIN POST**
4. **CUSTOMER EMAIL**
5. **ONE-PAGE SALES SHEET**

FOR EACH ITEM:

- Match the length and style to where it will be used
- Explain the customer problem and work completed
- Use plain language
- Include a clear next step

RULES:

- Use only verified project information
- Do not invent savings, results, dates, scope, or customer quotes
- Remove the customer name if permission has not been given
- Mark missing information instead of guessing

ONE SET OF FACTS. FIVE DIFFERENT USES.

RUN IN CHATGPT

ONE PROJECT. FIVE FINISHED PIECES.

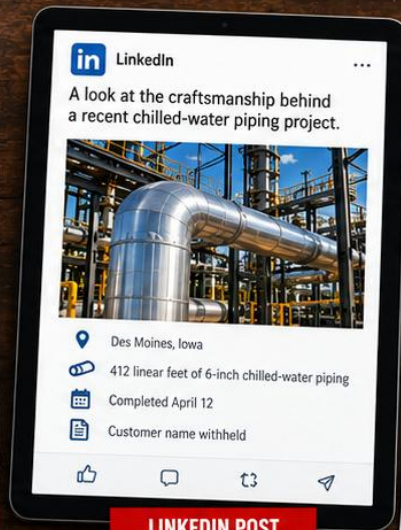
FICTIONAL SAMPLE



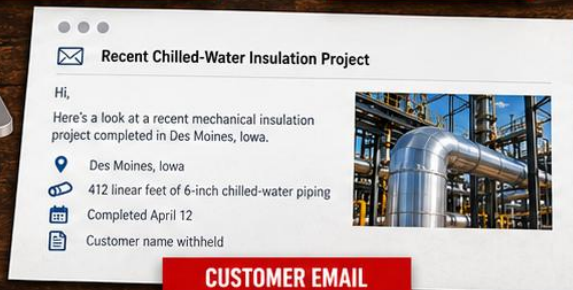
WEBSITE PROJECT PAGE



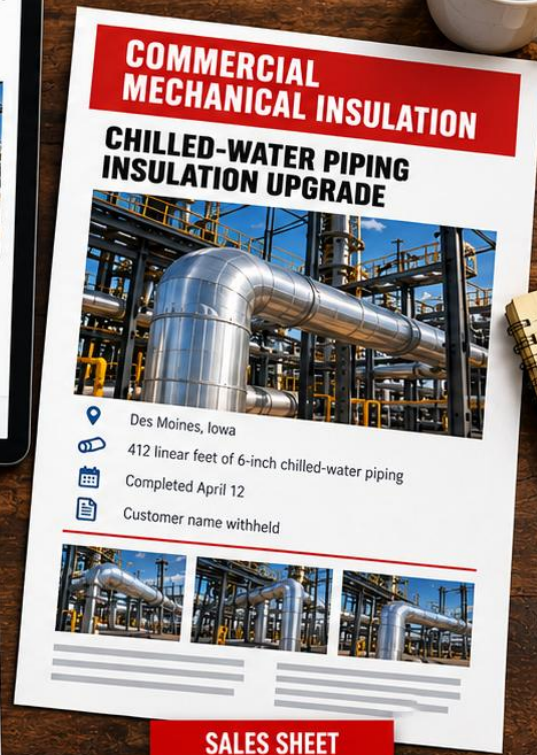
GOOGLE BUSINESS POST



LINKEDIN POST



CUSTOMER EMAIL



SALES SHEET

THE FACTS STAY THE SAME. THE FORMAT CHANGES.

CREATE IT ONCE. SCHEDULE THE MONTH.

EXAMPLE CONTENT CALENDAR

Week

2 weeks

Month

MON Apr 7	TUE Apr 8	WED Apr 9	THU Apr 10	FRI Apr 11	SAT Apr 12	SUN Apr 13
	 PROJECT HIGHLIGHT GOOGLE BUSINESS		 PROJECT UPDATE LINKEDIN			
MON Apr 14	TUE Apr 15	WED Apr 16	THU Apr 17	FRI Apr 18	SAT Apr 19	SUN Apr 20
	 CUSTOMER QUESTION FACEBOOK		 SERVICE SPOTLIGHT LINKEDIN		 PROJECT FOLLOW-UP FACEBOOK	

THE ROUTINE

1

REVIEW THE CONTENT

2

CHOOSE THE DATES

3

CHECK WHAT PERFORMED



PREPARED SCHEDULING EXAMPLE

CONTENT GETS PUBLISHED EVEN WHEN THE WEEK GETS BUSY.

SECTION 05

ORGANIZE OPERATIONS

Turn scattered information into clear next steps.

TAKE BACK YOUR TIME WITH AI

05

WHERE DOES **IMPORTANT** **INFORMATION** GET LOST?



EMAILS? TEXTS? FIELD NOTES? MEETINGS?

INFORMATION ARRIVES IN PIECES

WHAT COMES IN

Project Update

Hi Team,
Here are a few updates from today's meeting. Let me know if you have any questions.

- Insulation is complete in Area B
- Need to confirm equipment delivery
- Weather may impact next week

Thanks,

EMAIL

4/12

- Insulation complete in Area B
- Chilled water tie-in looks good
- Need crane next week
- Check roof penetration
- Good progress overall

FIELD NOTE

Crews finished the insulation in Area B today.

Looks good. Anything holding up the next phase?

Just waiting on the equipment delivery. Should be here next week.

TEXT MESSAGE

WHAT THE TEAM NEEDS

ACTION LIST

Task	Owner	Due Date	Status
Confirm equipment delivery	Project Team	4/15	Open
Schedule crane for next week	Operations	4/16	In Progress
Review roof penetration details	Field Team	4/16	In Progress
Prepare next coordination meeting	Project Team	4/18	Not Started
Monitor weather impact and adjust plan	Project Team	4/19	Not Started

ACTION LIST

CHANGE-ORDER DRAFT

Project: _____
Subject: Additional Insulation Scope

Summary

Scope of Work

- _____
- _____
- _____

Schedule Impact

CHANGE-ORDER DRAFT

FOLLOW-UP EMAIL

Hi Team,

Here's a summary of today's updates and next steps.

1. Insulation in Area B is complete.
2. Equipment delivery is expected next week.
3. We'll schedule the crane and confirm roof penetration details.
4. Next coordination meeting is set for 4/18.

Let me know if you see anything else we should address.

Thanks,

FOLLOW-UP EMAIL

AI CAN ORGANIZE THE INFORMATION. YOUR TEAM DECIDES THE ACTION.

THE PROMPT: MEETING **NOTES TO ACTIONS**

Turn these meeting notes into a clear action list.

FOR EACH ACTION, INCLUDE:

- Task
- Owner
- Due date
- Current status
- Information still needed

ALSO IDENTIFY:

- Decisions made
- Unanswered questions
- Risks or delays mentioned
- Items requiring customer follow-up

RULES:

- Do not assign an owner unless the meeting names one
- Do not create a deadline unless one was stated
- Mark missing information as NOT ASSIGNED
- Keep decisions separate from proposed ideas
- Do not invent commitments

MEETING NOTES:

[PASTE NOTES OR TRANSCRIPT]

EVERYONE LEAVES WITH THE SAME NEXT STEPS.

RUN IN CHATGPT

AI SHOWED WHAT WAS **STILL MISSING**

ACTION LIST

TASK	OWNER	DUE	STATUS
Confirm equipment delivery	Maria	Apr 15	OPEN
Schedule the crane	Jake	Apr 16	OPEN
Get roof penetration details	NOT ASSIGNED	NOT ASSIGNED	BLOCKED
Monitor weather and update team	Sam	Friday	OPEN
Respond about Area B start date	NOT ASSIGNED	NOT ASSIGNED	PENDING

CONFIRMED

Area A insulation is complete.
Next meeting: Apr 18 at 9:00 a.m.

UNANSWERED

Who will contact the architect?
Can Area B begin Monday?

RISK

Weather may affect exterior work.

THE GAPS ARE NOW VISIBLE **BEFORE THEY BECOME DELAYS.**

THE PROMPT: FIELD NOTES TO **CHANGE ORDER**

Using the approved field notes, photos, customer request, and contract information provided, create an **INTERNAL CHANGE-ORDER DRAFT**.

INCLUDE:

- Project and date
- Who requested the change
- Original scope
- Requested change and reason
- Labor, material, and equipment information provided
- Possible schedule impact
- Supporting photos or documents
- Information still needed
- Review and approval fields

RULES:

- Do not decide who is responsible
- Do not determine contract entitlement
- Do not calculate or invent price
- Do not promise a schedule
- Mark missing information as **TO BE CONFIRMED**
- Clearly separate facts from assumptions

ORGANIZE THE RECORD BEFORE DETAILS ARE FORGOTTEN.

RUN IN CHATGPT OR CLAUDE

FIELD NOTES BECAME A REVIEWABLE DRAFT

INTERNAL DRAFT — FICTIONAL SAMPLE

CHANGE ORDER REQUEST

Prairie Foods Facility Renovation

Date Reported: April 12

Requested By: Jordan, Customer Project Manager

ORIGINAL SCOPE

Chilled-water piping shown in original drawings

REQUESTED CHANGE

Add approximately 60 LF of new 4-inch chilled-water piping

REASON

Added during coordination

WORK STARTED: NO

TO BE CONFIRMED

TO BE CONFIRMED

Material & Thickness ☐ TO BE CONFIRMED

Labor ☐ TO BE CONFIRMED

Equipment ☐ TO BE CONFIRMED

Price ☐ TO BE CONFIRMED

Schedule Impact ☐ TO BE CONFIRMED

SUPPORTING RECORD

Customer email + 3 jobsite photos

REVIEW

Project Manager

☐

Estimator

☐

Customer Approval

☐

THE RECORD IS ORGANIZED. THE DECISIONS STILL BELONG TO THE TEAM.

APPROVED DETAILS BECAME A **BRANDED INVOICE**

APPROVED DETAILS

- ☒ Prairie Foods Facility Renovation
- ☒ 60 LF installed
- ☒ Labor: 24 hours
- ☒ Materials: \$2,840
- ☒ Equipment: \$450
- ☒ Approved Total: \$6,890
- ☒ Logo + payment terms

CLAUDE

NORTHSTAR
MECHANICAL

FICTIONAL SAMPLE

INVOICE Invoice #1047

Prairie Foods Facility Renovation
Additional chilled-water piping

DESCRIPTION	QTY / HRS	RATE	AMOUNT
Labor	24 hours	\$150.00	\$3,600
Materials	60 LF	\$47.33	\$2,840
Equipment	1	\$450.00	\$450

TOTAL DUE **\$6,890**

Payment Terms
Net 30

REVIEW BEFORE SENDING

FROM APPROVED INFORMATION TO A **PROFESSIONAL PDF IN MINUTES.**

SECTION 06

BUILD REPEATABLE PROCESSES

Capture what your experienced people know.

TAKE BACK YOUR TIME WITH AI

06

AUDIENCE QUESTION

WHAT DOES **ONLY ONE PERSON** AT YOUR COMPANY KNOW?

A CUSTOMER. A PROCESS. A SHORTCUT. A FIX.



TURN TO SOMEONE NEAR YOU. **NAME ONE THING.**

DON'T WRITE THE MANUAL. EXPLAIN THE WORK.

THE EXPERT



SPEAK IT

TRANSCRIPT

"First, verify the work order."

"Next, confirm materials and access."

"If anything changed, stop and document it."

1. WHAT DO YOU DO FIRST?
2. WHAT USUALLY GOES WRONG?
3. WHAT SHOULD NEVER BE SKIPPED?

TEN MINUTES OF TALKING CAN SAVE YEARS OF KNOWLEDGE.

THE PROMPT: **TURN EXPERIENCE INTO AN SOP**

COPY + PASTE _____

Turn the transcript below into a clear SOP for a new employee.
Include:

- Purpose
- Tools and materials
- Step-by-step instructions
- Safety checks
- Common mistakes
- When to stop and ask for help

Use plain language. Do not invent missing steps.
Mark anything unclear: **NEEDS EXPERT REVIEW.**

THE **EXPERT REVIEWS** IT BEFORE THE TEAM USES IT.

TEN MINUTES OF TALKING BECAME A ONE-PAGE SOP

EMPLOYEE TRANSCRIPT

Okay so when I get to a job I usually check the work order first ... make sure I have the right address and I can get in ...

Then I look at the drawings and see what we're doing ...

I check the truck for materials and compare them to the list ...

Once I'm on site I look at the actual conditions and make sure it matches the scope ...

If something looks different I take a few pictures and let the supervisor know before we start ...

And yeah, I always do the safety check ... make sure it's safe to work ... if the scope changed or the materials don't match or I can't get access, I stop and ask someone ...



SOP: BEFORE STARTING A JOB

FICTIONAL
SAMPLE



PURPOSE

Start every job with the correct scope, materials, and access.



TOOLS & MATERIALS

☐ Work order ☐ Drawings ☐ Material list ☐ Phone or camera



STEPS

- 1 Review the work order and drawings.
- 2 Confirm the job location and access.
- 3 Verify materials before unloading.
- 4 Compare field conditions with the approved scope.
- 5 Photograph and report any change before work begins.



SAFETY CHECK

Complete the required site and task safety review.



STOP AND ASK

● Scope changed ● Materials do not match ● Access is unsafe



NEEDS EXPERT REVIEW: Required PPE by job type



FINAL CHECK

☐ Scope confirmed ☐ Materials confirmed ☐ Changes documented

EASIER TO TRAIN. EASIER TO REPEAT. LESS DEPENDENT ON MEMORY.

WHAT **PROCESS** WOULD YOU EXPLAIN TO A **NEW EMPLOYEE?**



WHAT DO YOU DO FIRST?

WHAT USUALLY GOES WRONG?

WHAT SHOULD NEVER BE SKIPPED?

TURN TO SOMEONE NEAR YOU. EXPLAIN THE FIRST STEP.

MONDAY MORNING: CHOOSE ONE

YOUR FIRST AI TASK

- ☐ I do it every week.
- ☐ It takes time I could use elsewhere.
- ☐ I have the information AI needs.
- ☐ I can check the result.

GOOD FIRST CHOICES



Draft a customer reply



Turn meeting notes into next steps



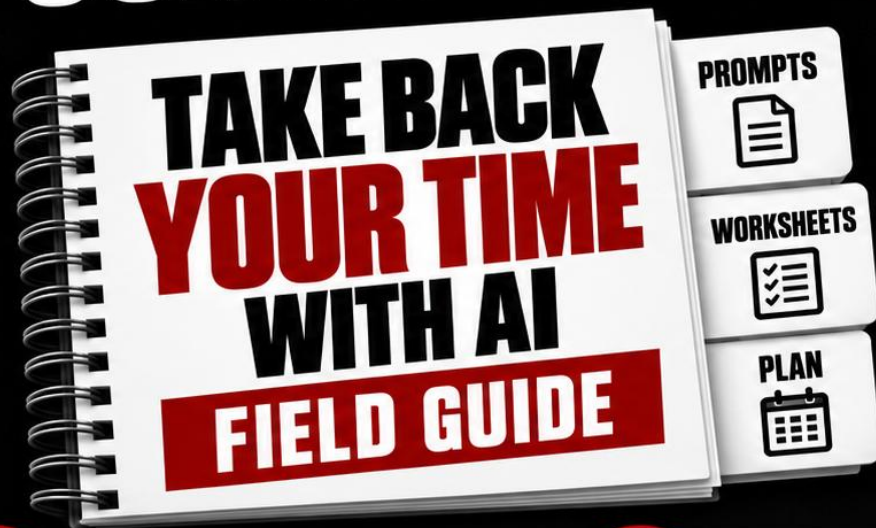
Turn a finished project into marketing

MONDAY AT _____, I WILL USE AI TO _____.

WRITE IT DOWN. TELL A PARTNER. TRY IT MONDAY.

30 SECONDS

YOUR NEXT STEP **STARTS MONDAY**



1

**CHOOSE ONE
REPEATED TASK.**

2

**USE ONE
PROMPT.**

3

**MEASURE
THE TIME SAVED.**

**WANT YOUR TEAM TO BUILD THESE WORKFLOWS TOGETHER?
BRING THIS HANDS-ON WORKSHOP TO YOUR COMPANY.**

CHRIS SUND

TAKE BACK YOUR TIME. PUT IT WHERE IT MATTERS.



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