Digitalise

Sample

Hours-Back Plan

Prepared for Example Plumbing Co (a fictional business)

Prepared by	Date	First visit
Digitalise	26 November 2026	19 November 2026

This is a sample. Example Plumbing Co is a made-up business with an owner, three plumbers on the road and a part-time office manager. The tasks, hours and tools below are illustrations, and your own plan uses your numbers.

1 Summary

What we found. About 14.5 hours a week go on eight repetitive tasks, most of them on the phone: calls returned at night, customers rung the day before and quotes chased by hand. Accepted quotes are typed into three systems.

What we recommend first. Missed-call text back and an after-hours digital receptionist, because that is where your evenings go. Then accepted quotes that become jobs and draft invoices on their own.

Estimated time back: 8 hours a week, once all eight automations are running.

2 Where the hours go

At the first visit we went through a normal week with you and your office manager. These are the repetitive tasks that came up, who does each one and the time it takes today.

Task	Who does it	Hours a week today
Returning missed calls	You and your plumbers	3
Taking after-hours calls	You	1.5
Booking jobs and confirming times	Office manager	2.5
Ringing customers the day before	Office manager	1.5
Following up quotes	You	1.5
Typing accepted quotes into three systems	Office manager	2
Chasing overdue invoices	Office manager	1.5
Reminding past customers a service is due	Office manager	1
Total	**Eight tasks**	**14.5**

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3 What we would automate

Each automation is built around the tools you already use. The hours saved are our estimates from the first visit.

Automation	How it works	Tools involved	Hours saved a week (estimate)
Missed-call text back	A caller you miss gets a text within seconds, with a link to book a time or a prompt to reply.	Business mobile, SMS service, Google Calendar	1.5
After-hours digital receptionist	Answers in your business name and says it is digital. Books routine work and texts you the details of anything urgent.	Business mobile, digital receptionist, Google Calendar	1
Booking confirmations	Each new booking in the calendar sends the customer a text with the day, the time window and the address.	Google Calendar, SMS service	1
Day-before reminders	A text the afternoon before each job. Customers reply 1 to confirm or 2 to change, and changes go to the office.	Google Calendar, SMS service	1
Quote follow-ups	A text three days after each quote and one more at day seven. It stops as soon as the customer replies or accepts.	Job app, SMS service	1
Accepted quote to job and invoice	An accepted quote creates the job, the calendar booking and a draft invoice in Xero.	Job app, Google Calendar, Xero	1.5
Overdue invoice reminders	Texts at 7, 14 and 21 days overdue, with the link to the invoice. They stop once Xero shows it paid.	Xero, SMS service	0.5
Service-due reminders	A text when a past customer's hot water system is due for a service, with a link to book.	Job app, SMS service	0.5
Total	**Eight automations**	**Six tools, listed under Tools and data**	**8**

4 Not worth automating

Some tasks are better left as they are. We say so here, with the reason.

- ▢ **Quotes for larger jobs.** A bathroom renovation or a re-pipe needs your judgement on site. We would automate only the follow-up.
- ▢ **Ordering parts.** It takes about 20 minutes a week. Automating it would cost more than the time it saves.
- ▢ **Warranty claims.** They come up a few times a year, and each one is different. A person does them better.

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5 The sum

This is your own arithmetic. The hours are our estimates from the first visit, and the hourly rate is the figure you gave us for an hour of your team's time: in this sample, $85.

8 hours a week × $85 an hour = $680 a week. Over 52 weeks, that is $35,360 a year.

About 3.5 of those hours are yours and your plumbers', most of it time on the phone. The other 4.5 are your office manager's. The sum shows what the time is worth at your own rate. It is not a promise of savings, and the cost of the work is in your written quote.

6 Tools and data

We build around the tools you already use, so nothing in this plan asks you to change software. This is every tool involved, the information that passes through it and who can see it.

Tool	What passes through it	Who can access it
Business mobile	Caller numbers and call times, so a missed call can be texted back. After hours, calls go to the digital receptionist.	You, and your office manager on office days.
Digital receptionist	Each caller's name, number, address and job, and a short written summary of the call.	You and your office manager. Digitalise, to look after it.
SMS service	Customer mobile numbers and the wording of each text.	Your office manager. Digitalise, to look after it.
Google Calendar	Bookings: name, address, type of job and time.	You, your office manager and your plumbers. Digitalise's connection, once you approve it.
Job app	Customers, quotes, jobs and job notes.	You, your office manager and your plumbers. Digitalise's connection, once you approve it.
Xero	Draft invoices, invoice status and payments.	You, your office manager and your bookkeeper. Digitalise's connection, once you approve it.

7 Calls and texts

The digital receptionist says it is digital. It answers in the name Example Plumbing Co and says at the start of every call that it is a digital receptionist. A caller who would rather speak to a person can ask for a call back, and you get the details by text.

Calls are not recorded in this setup. The receptionist writes a short summary of each call and texts it to you. If a business wants calls recorded, the plan says so here, and callers are told at the start of the call.

Marketing texts go only to customers who agreed. Quote follow-ups and service-due reminders are treated as marketing. They go only to customers who have agreed to hear from you, they name your business and each one ends with "Reply STOP to opt out". Booking confirmations and reminders are about a job the customer booked and carry no marketing.

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8 Timeline

This is an example of the order we would work in, not a promise of dates. Week 1 starts after you approve the plan and the quote, and the pace depends on your tools and on when you approve each piece.

Example. The order of work for this sample plan.

When	What happens
Week 1	We connect your business mobile, Google Calendar, the job app and Xero, and agree the wording of every text with you.
Week 2	Missed-call text back and the after-hours digital receptionist. We test both with our own calls before a customer hears them.
Week 3	Booking confirmations, day-before reminders and quote follow-ups, each tested before it is switched on.
Week 4	Accepted quotes to jobs and invoices, overdue invoice reminders and service-due reminders, tested on sample jobs first.
After that	We monitor it all, fine-tune it and send your first monthly report.

9 Looking after it

Once each automation is live, we monitor it and fine-tune the wording and timing when something needs it. Each month you get a short report on how each one is running.

For anything you want changed, there is one number to call: 0431 136 509.

10 Your quote

Your written quote appears here

It is itemised by automation, so you can choose all of it, some of it or none of it.
Nothing goes ahead until you approve it.

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Sample document. Example Plumbing Co is a fictional business.