

GeekThangs

AI Game Plan

Kestrel Point Restoration

Working session: Tuesday, September 15, 2026. Plan delivered: Thursday, September 17, 2026.

Sample plan: fictional business

Kestrel Point Restoration and the people in this plan are made up. The business is shaped like the owners we work with, and the numbers show how a real plan is built from an owner's own figures.

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1. Your business at a glance

From the intake form and the first part of the session.

What you do	Water, fire and mold restoration for homes and small commercial buildings in Macomb County, Michigan
Your team	12 people: the owner, an operations manager, an office manager, two project managers who also estimate, and seven technicians
Your work	About 420 jobs a year: 70% water, 20% fire and smoke, 10% mold and other
Average job	Water mitigation about \$6,800. Fire about \$38,000
Who pays	Mostly insurance carriers, through homeowners' claims
Tools you already pay for	Xactimate, CompanyCam, QuickBooks Online, Google Workspace, a moisture-mapping app
Hourly values used in this plan	Owner \$85. Project manager \$45. Office manager \$30. Each includes payroll taxes; all are your numbers
What you want	"Get my evenings back, and get paid faster on closed jobs."

2. Decisions made in the session

14 decisions in three rounds. Each one is settled unless you change it.

Round 1: goals and limits

1. The goal is hours back for the office and the owner, not more leads. Leads are not the bottleneck; paperwork after the job is.
2. Xactimate stays the source of every price. AI writes the words around an estimate, never the numbers.
3. Nothing AI-written reaches a homeowner or an adjuster until a person has read it.
4. Customer files and photos go only into a business AI account with training on customer data switched off.

Round 2: where the time goes

5. The job-close packet is the first target. It takes about 9 hours a week and it holds up payment.
6. Estimate narratives come second. Homeowner and adjuster updates come third.
7. Technician scheduling stays as it is. The operations manager's board works, and changing it costs more than it saves.
8. Marketing and social posts are out of scope for the next 90 days.
9. Collections follow-ups are parked for the day-90 review.

Round 3: who and how

10. The office manager owns the packet work. The owner owns the estimate narratives.

11. Two paid AI assistant seats for the first 30 days, one for the office manager and one for the owner. Decide on more at day 30.
12. Photos keep their current CompanyCam names, and any packet tool reads them as they are.
13. The number to watch is days from job complete to packet sent, tracked weekly in a shared sheet. Today it is about 9 days.
14. Progress is reviewed at day 30 and day 90.

3. The top 3 places AI saves you time

Hours back a week, times the hourly value of whoever does the work today, times 50 working weeks, equals the yearly value.

1. Job-close packets for adjusters

Today. The office manager and the project managers pull photos, moisture readings, drying logs and a scope summary into each carrier's format by hand. About 9 hours a week.

With AI. A draft packet is built from the job folder in the carrier's format. The office manager checks it, fixes what is wrong and sends it. About 3 hours a week.

Hours back a week	Hourly value	Yearly value
6 hours	\$36 (office manager and project managers, blended)	\$10,800

Packets go out in about 3 days instead of 9, so carriers pay sooner.

2. Estimate narratives and scope notes

Today. After each walkthrough, the owner or a project manager writes the narrative that goes with the Xactimate estimate from handwritten notes. About 8 hours a week.

With AI. A two-minute voice memo after the walkthrough becomes a draft narrative in your company's voice. The writer edits it; Xactimate still sets every price. About 3 hours a week.

Hours back a week	Hourly value	Yearly value
5 hours	\$55 (owner and project managers, blended)	\$13,750

The owner gets most of these hours back in the evening.

3. Homeowner and adjuster updates

Today. The office manager calls or texts each open job's homeowner and adjuster with status, one at a time. About 6 hours a week.

With AI. Standard updates for each stage of a job, filled in from the job list and read before sending. About 2 hours a week.

Hours back a week	Hourly value	Yearly value
4 hours	\$30 (office manager)	\$6,000

Fewer "where are we" calls coming back in.

All three together: 15 hours a week, about \$30,550 a year.

4. Quick wins for week one

No build needed. Each one names who does it and about how long it takes.

What to do	Who and how long
Set up the two business AI seats with training on customer data switched off.	Office manager, 30 minutes
Write a one-page "how we write" sheet: your tone, the words you use with homeowners, the words you never use. It goes at the top of every draft.	Owner, 45 minutes
Time the packet on five closed jobs to set the baseline.	Office manager, through the week
After one walkthrough, record a voice memo and turn it into a draft narrative. Compare it with what you would have written.	Owner, 20 minutes
Draft three standard homeowner updates (day one, drying check, job complete), edit them, and save them on the office phone.	Office manager, 30 minutes

5. Your 30/60/90-day plan

The number to watch: days from job complete to packet sent. Today about 9. Target 3 by day 90.

Days 1 to 30: habits and a baseline

- Week-one quick wins done.
- Baseline packet time measured on five jobs.
- Every water job's narrative drafted from a voice memo.
- Decide on the follow-up call whether you build the packet tool yourselves or have us build it.

Days 31 to 60: the packet tool goes live

- The packet tool runs on every closed job.
- The first 20 packets go through it, and the office manager notes every fix.
- Days to packet tracked weekly in the shared sheet.

Days 61 to 90: make it the way you work

- Standard updates used on every open job.
- Voice-memo narratives extended to fire jobs.
- Day-90 review: hours back against this plan's 15, days to packet against the target of 3, and whether collections follow-ups come next.

6. What GeekThangs would build

Every item can also be done in-house. The cost of each one is quoted on the follow-up call, once you have picked what comes first.

Build	What it does	Build time	Cost
Job-close packet tool	Reads the job's CompanyCam photos and moisture readings and drafts the packet in each carrier's format for the office manager to check.	About 2 to 3 weeks	Quoted on the follow-up call
Walkthrough-to-narrative setup	A voice memo in, a draft narrative out in your company's voice, saved to the job folder.	About 1 week	Quoted on the follow-up call
Standard updates	Update wording for each stage of a job, filled in from the job list, with a short send checklist.	2 to 3 days	Quoted on the follow-up call

7. Your next step

Follow-up call: Tuesday, September 22, 2026, 30 minutes

We walk the plan together and settle three questions:

- Which of the three is most urgent?
- Do you want to do it yourselves, or have us build it?
- What is your timeline?

Please bring the five-job packet baseline from the week-one quick wins.