Find 10 hours a week: the AI checklist for contractors

30 places construction and trades businesses lose time every week, and what an AI agent can take off your plate. Work through it with your office manager or PM in about 20 minutes.

STEP 1
Check it
Tick every item that takes your team more than an hour a week.

STEP 2
Estimate it
Write down the rough hours per week next to each checked item. Be honest, not optimistic.

STEP 3
Rank it
Circle the three biggest that follow clear rules and use information you already have in email, spreadsheets or software.

STEP 4
Start with one
Pick the one with the lowest risk if it goes wrong. That's your first agent. A person approves its work until you trust it.

1. Office & admin

The paperwork that eats the first and last hour of every day.

	WHERE THE TIME GOES	WHAT AN AI AGENT CAN DO (A PERSON APPROVES)	HRS/WK
☐	**Morning inbox triage** You start the day sorting email from customers, subs, suppliers and inspectors.	Sorts overnight email by job and urgency, and drafts replies for the routine ones.	_____
☐	**Typing up notes** Phone calls and site walks end up as notes someone retypes later.	Turns voice memos and rough notes into clean, filed notes on the right job.	_____
☐	**Hunting for documents** People ask "where's the latest plan set, contract or permit?" more than once a week.	Answers from your own files and links the source, so nobody digs through folders.	_____
☐	**Answering the same questions** New hires and office staff ask the same how-do-we questions over and over.	An office assistant that knows your SOPs and past jobs, and says when it isn't sure.	_____
☐	**Data re-entry** The same job details get typed into the estimate, the job tracker and QuickBooks.	Copies details between systems and flags mismatches for a person to check.	_____

2. Estimating & bids

Where work is won or quietly lost.

	WHERE THE TIME GOES	WHAT AN AI AGENT CAN DO (A PERSON APPROVES)	HRS/WK
☐	**Bid follow-up** Quotes go out and nobody chases them for a week or more.	Watches open bids and drafts a friendly follow-up in your voice when one goes quiet.	
☐	**Lead response time** Web and phone leads wait hours, or until the weekend, for a reply.	Drafts a same-day first reply with your questions and a link to book a time.	
☐	**Bid invitations** You read every invitation to bid to decide if it's worth your time.	Summarizes scope, location, due date and fit against your rules, so you only open the good ones.	
☐	**Scope summaries** Estimators reread long specs to pull out what matters.	Pulls inclusions, exclusions and questions from a scope into a one-page draft for the estimator.	
☐	**Proposal assembly** Every proposal is rebuilt by hand from an old one.	Assembles a first draft from your templates and the estimate, ready for your edits.	

3. Scheduling & crews

The weekly puzzle of who goes where.

	WHERE THE TIME GOES	WHAT AN AI AGENT CAN DO (A PERSON APPROVES)	HRS/WK
☐	**Next week's schedule** Building the crew schedule takes a chunk of Friday, every Friday.	Drafts next week's schedule from jobs and availability, for you to adjust and approve.	
☐	**Double-bookings** Conflicts get caught on Monday morning instead of last week.	Flags crews, equipment or subs booked in two places before the schedule goes out.	
☐	**Weather risk** Rain and cold days scramble the week with little warning.	Checks the forecast against outdoor work and suggests swaps for a person to approve.	
☐	**Customer appointment reminders** Crews show up to locked doors or customers who forgot.	Drafts reminder texts or emails the day before, sent only after your sign-off.	
☐	**Delivery coordination** Material deliveries get confirmed by phone tag.	Tracks expected deliveries and drafts confirmations or reschedule notes.	

4. Field & job reporting

Turning what happened on site into something the office can use.

	WHERE THE TIME GOES	WHAT AN AI AGENT CAN DO (A PERSON APPROVES)	HRS/WK
☐	**Daily log roll-up** Someone chases crews every morning for yesterday's updates.	Collects notes and photos and drafts one morning job report for the office.	
☐	**Behind-schedule jobs** You find out a job slipped when the customer calls.	Compares progress to milestones and flags jobs falling behind.	
☐	**Photo organization** Job photos live on five phones and nobody can find the right one.	Files photos to the right job and phase with a short caption.	
☐	**Punch lists** Punch items live in texts and get missed at closeout.	Turns walkthrough notes into a punch list and tracks what's still open.	
☐	**Weekly owner update** Customer or owner updates take an hour to write each week.	Drafts the weekly update from the logs, for the PM to review and send.	

5. Subs, vendors & paperwork

The compliance work nobody wants to own.

	WHERE THE TIME GOES	WHAT AN AI AGENT CAN DO (A PERSON APPROVES)	HRS/WK
☐	**Certificates of insurance** Expired COIs get noticed after a sub is already on site.	Tracks expiration dates and drafts renewal requests ahead of time.	
☐	**W-9s and lien waivers** Paperwork is missing when it's time to pay or close out.	Keeps a checklist per sub and job and drafts requests for what's missing.	
☐	**Sub confirmations** You call or text each sub to confirm dates every week.	Drafts confirmation messages from the schedule and logs the replies.	
☐	**RFIs and submittals** Open questions sit unanswered and nobody owns the follow-up.	Keeps a running list of open items with owners and due dates and drafts nudges.	
☐	**Change orders** Extra work gets done in the field and never billed.	Turns field notes about extra work into a change order draft for approval.	

6. Customers & money

The work that gets you paid and brings the next job.

	WHERE THE TIME GOES	WHAT AN AI AGENT CAN DO (A PERSON APPROVES)	HRS/WK
☐	**Invoice drafts** Invoices go out days after the work is done.	Drafts invoices from completed work and milestones for review in QuickBooks.	
☐	**Collections reminders** Overdue invoices get chased only when cash is tight.	Watches past-due invoices and drafts polite reminders on a schedule you set.	
☐	**Review requests** Happy customers never get asked for a review.	Drafts a review request after closeout, sent only when you approve it.	
☐	**Warranty and service calls** Callbacks arrive by phone, text and email with no single list.	Logs each request in one place and drafts the reply and next step.	
☐	**Weekly numbers** You don’t see this week’s numbers until month-end.	Pulls a short weekly summary of jobs, bids, invoices and cash for Monday morning.	

Add it up

Total hours checked per week	Top 3 candidates	Your first agent

A good first workflow

- **It happens every week.** Daily or weekly work pays back fastest.
- **It follows rules you could write down.** If you can explain it to a new hire, an agent can draft it.
- **The information is already digital.** Email, spreadsheets, QuickBooks, your job tracker or photos.
- **A person can check the output quickly.** Drafts you approve beat anything that acts on its own.

What not to automate first

- Anything that sends money or signs contracts without a person.
- Safety-critical decisions on site.
- Work that only happens a few times a year.
- Processes your team doesn’t agree on yet. Fix the process first.

Want a second set of eyes?

Book a free 15-minute AI mini-audit with Brooks Clifford. Bring this checklist and leave with your first AI win and the plan that fits.

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Purple AI is an AI consulting firm in Minneapolis, Minnesota. We build and run teams of AI agents for construction, trades and other small and mid-sized businesses, with a person signing off on what matters. Fractional plans from $750/month, month-to-month. The examples in this checklist are typical workflows, not client results. © 2026 Purple AI