



FREE GUIDE FOR UK TRADES AND CONSTRUCTION

The AI Playbook for Trades

25 jobs to hand to AI this week, with the prompts. Plus how to run your enquiries, ads, quotes and jobs with AI, and a 30-day plan to put it in place.

Grow your business. Automate the rest.

What this playbook covers

Written for owners of trades and construction businesses who know AI could help, but haven't had the time to make it stick. Plain English, no jargon, and every idea works with tools you can open today.

01 Why AI attempts stall

The four reasons most owners give up, and how to avoid them

02 25 jobs to hand to AI this week

Sales, marketing, quotes, site and office, each with a ready prompt

03 Never let an enquiry go cold

An AI follow-up system and a CRM that chases itself

04 Meta ads with AI

Better ads, cheaper enquiries and numbers you can trust

05 AI for quotes, jobs and projects

Faster quotes and profit per job while the job is live

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Run by AI. Approved by you.

07 Your 30-day plan

Week by week, about two hours a week

08 When you'd rather it was done for you

How AEY sets it up and joins it all together

Why AI attempts stall

Most owners have tried ChatGPT or something like it. A few clever answers later, it's back to doing everything by hand. That's not because AI doesn't work for trades. It's usually one of four things.

1

It's used like a search engine

Asking one-off questions gets one-off answers. The value comes from giving AI a repeatable job, with your details and your standards, every time.

2

It doesn't know your business

Without your prices, your services, your area and your tone, the answers are generic. Ten minutes writing a "business brief" (below) fixes most of this.

3

Nothing is joined up

Enquiries in one inbox, quotes in a spreadsheet, jobs on a whiteboard, money in Xero. AI can only help with the bits it can see.

4

There's no time to set it up

Between jobs, setting up systems never wins. The fix is to start small: one job a week, kept, rather than ten tried once.

Before anything else: write your business brief

Open a note and write down, in plain words: what you do and don't do, the area you cover, typical job sizes and prices, your accreditations, how you like to speak to customers, and what makes a good customer for you. Paste it at the start of any AI conversation, or save it as custom instructions in your AI tool. Every prompt in this playbook works better with it.

Here is my business brief: [paste]. Read it and ask me up to 10 questions that would help you write in my voice and quote like me. Then rewrite the brief as a one-page summary I can reuse.

25 jobs to hand to AI this week

Each one takes minutes. Change the words in [brackets], paste your business brief first, and always read the result before it goes to a customer.

ENQUIRIES AND SALES

1 Reply to a new enquiry in your voice.

Using my brief, write a friendly reply to this enquiry: [paste]. Thank them, confirm what they asked for, ask the two questions I need to quote, and offer two times for a call or visit.

2 Turn a voicemail or call notes into a tidy summary.

Summarise these call notes into: customer, job, address area, budget, timescale, next step and who owns it.
Notes: [paste]

3 Chase a quote that's gone quiet.

Write a short, polite follow-up to a customer who received my quote for [job] [number] days ago. No pressure, offer to answer questions, and give one reason to book now that is true: [e.g. next available start date].

4 Prepare for a site visit.

I'm visiting a customer about [job]. List what to check on site, what to measure, the photos to take and the questions to ask so I can quote accurately first time.

5 Answer the common objections.

Customers often say [e.g. "it's more than the other quote"]. Write three calm, honest ways to respond, without discounting, using what makes us different from my brief.

6 Write a cold email to a commercial client.

Write a 90-word email to the facilities manager of a [type of business] near [area], introducing my [service]. One clear reason it helps them, one question, no hype. Include an opt-out line.

MARKETING

7 Turn a finished job into a social post.

Write a Facebook post about a [job] we finished in [area]: the problem, what we did, and the result. Keep it under 80 words, plain English, no emojis. I'll add the photos.

8 Ask for a review at the right moment.

Write a short text to send a happy customer the day after we finish, thanking them and asking for a Google review with this link: [link].

9 Reply to reviews, good and bad.

Write a reply to this review: [paste]. If it's positive, thank them personally. If it's negative, acknowledge it, don't argue, and offer to call them.

10 Write ad ideas you can test.

Give me 5 short Facebook ad headlines and 3 opening lines for [service] in [area], aimed at [ideal customer]. Each from a different angle: cost, time, quality, trust, urgency that is true.

11 Improve a page on your website.

Here's the text from my [service] page: [paste]. Rewrite it so a homeowner understands what we do, where we work, what it roughly costs and how to get a quote, in under 250 words.

QUOTES AND ESTIMATING

12 Turn rough notes into a professional quote.

Turn these notes into a clear quote: scope of work, what's included, what's not included, materials, timescale, payment stages and validity period. Notes: [paste]. Don't change any prices.

13 Check a quote for gaps.

Review this quote as a cautious customer and as an experienced [trade]. What's unclear, missing or likely to cause an argument later? [paste]

14 Build a materials list.

For [job description and sizes], draft a materials checklist grouped by stage. Mark anything I should confirm on site. I'll add quantities and prices.

15 Explain options in plain English.

Explain the difference between [option A] and [option B] for [job] to a homeowner in 120 words: pros, cons, rough lifespan, and who each suits.

16 Write your terms in plain words.

Rewrite these terms so a customer understands them, without changing their meaning: [paste]. Flag anything you think a solicitor should check.

JOBS AND SITE

17 Plan the week's jobs.

Here are next week's jobs, crew and lead times: [paste]. Suggest a schedule that keeps travel down, flags clashes, and lists what must be ordered by when.

18 Write a job brief for the team.

Turn this into a one-page job sheet for the team: address area, access, scope, materials, safety points, customer preferences and who to call. [paste]

19 Draft a risk assessment and method statement.

Draft a starting risk assessment and method statement for [task] at [type of site]. Use plain headings. I'll check it against our own procedures before use.

20 Keep the customer updated.

Write a short update for the customer: what we did today, what's next, and anything we need from them. Friendly, under 60 words. Today's notes: [paste]

21 Handle a variation properly.

The customer has asked for [change]. Write a short variation note: what's changing, the extra cost [£], the effect on the timescale, and a line for them to approve in writing.

OFFICE AND MONEY

22 Chase an overdue invoice.

Write three escalating reminders for invoice [number], [£] due on [date]: a friendly nudge, a firm reminder, and a final notice before further action. Professional throughout.

23 Make sense of a spreadsheet.

Here are last quarter's jobs with price and costs: [paste]. Which types of job made the best margin, which lost money, and what three questions should I ask myself?

24 Write a job advert.

Write a job advert for a [role] in [area]: what the work is, what we offer, what we need (tickets, experience, licence), and how to apply. Honest, no clichés.

25 Turn a long email chain into actions.

Summarise this email chain into: what's been agreed, what's still open, who's waiting on whom, and the next three actions with owners. [paste]

A word on customer details

Before pasting anything into an AI tool, remove names, addresses and phone numbers unless your tool and settings are approved for business data. Under UK GDPR you're responsible for your customers' details, wherever you put them.

Never let an enquiry go cold

The business that replies first, and keeps following up politely, wins far more of the work. AI makes both automatic.

The follow-up system

ENQUIRY ARRIVES

From your website, Facebook, a call or a directory

INSTANT REPLY

A text and email within a minute, confirming the next step

INTO THE CRM

One record per customer, with the source and the job

BOOK THE VISIT

The customer picks a slot that suits your diary

QUOTE AND CHASE

Polite follow-ups at set days until a yes or a no

Set up the basics, even without software

- ◆ **One place for every enquiry.** A CRM, or at the very least one shared spreadsheet. If it isn't written down, it can't be followed up.
- ◆ **Clear stages.** For example: New, Contacted, Visit booked, Quoted, Won, Lost. Every enquiry sits in exactly one stage.
- ◆ **A missed-call text.** Most phone systems can send an automatic text to missed callers: "Sorry we missed you, we're on a job. Reply with what you need and we'll call back today."
- ◆ **Follow-up days.** Agree when you chase a quote, for example after 2, 5 and 10 days, and use job 3's prompt each time.
- ◆ **A reason for every lost job.** Price, timing, went quiet, chose someone else. After three months, the pattern tells you what to fix.

Where AI takes over

Once enquiries live in one system, AI can do the legwork: draft every reply in your voice, remind you who to call today, write the follow-ups, and tell you each morning which quotes are going cold. You stay in charge of what's sent.

Here is my list of open quotes with dates and values: [paste]. Rank them by how likely they are to close and how much they're worth, and draft a follow-up for the top five.

Meta ads with AI

Facebook and Instagram ads can fill your diary, or quietly burn money. The difference is usually testing and tracking, and AI is good at both.

Five rules before you spend a pound

RULE	WHY IT MATTERS
Set a spending limit	Put an account spending limit in Meta Ads Manager before anything else. It's the safety net if an ad or a setting goes wrong.
Know your numbers	Work out what a job is worth to you and how many enquiries you need to win one. That tells you what you can afford to pay per enquiry.
Track to the sale	Cost per enquiry only tells half the story. Record which enquiries became jobs, so you know cost per job.
Test one thing at a time	Change the image or the headline, not both. Give each test enough budget and days to mean something.
Target your real area	Set the map to where you actually work. Out-of-area enquiries cost the same and win nothing.

How AI helps

- ◆ **Writing:** headlines, opening lines and angles to test (job 10).
- ◆ **Reading the numbers:** paste a week of results and ask what's working, what to pause and what to test next.
- ◆ **Spotting problems early:** spend with no enquiries, costs creeping up, or an ad that's run out of steam.
- ◆ **Checking claims:** ask AI to flag anything in your ad you couldn't prove. UK advertising rules expect evidence for claims like prices, savings and reviews.

Here are last week's ad results: [paste columns: ad, spend, clicks, enquiries]. Our jobs are worth about [£] and we win about [x] in 10 quotes. Which ads are paying their way, which should I pause, and what one test should I run next week?

AI for quotes, jobs and projects

Most firms only find out whether a job made money weeks after it finished, when the last bill lands. By then it's too late to do anything about it.

Profit per job, while the job is live

If your accounts are in Xero or similar, every supplier bill can be tagged to the job it belongs to, and labour can be added from timesheets. Compare that with what you quoted, and you can see a job drifting over budget while there's still time to act.

What to capture for every job

- Quoted price and estimated costs
- Supplier bills tagged to the job
- Hours worked, at each person's rate
- Variations agreed in writing
- Stage payments invoiced and received

What AI can then tell you

- Which jobs are over budget, and why
- Which types of work make the best margin
- Invoices due and unpaid
- Where your quotes are consistently too low
- What to change in next month's pricing

Quotes that win and protect you

Use jobs 12 to 16 to turn site notes into clear quotes with scope, exclusions, stages and validity. For construction work, make sure your quotes and invoices also handle CIS, the VAT domestic reverse charge and retentions where they apply. Check with your accountant.

Here's a finished job: quoted [£], with these costs [paste bills and hours]. Calculate the real margin, explain where it differed from the quote, and suggest how I should price the next similar job.

Run by AI. Approved by you.

AI should do the legwork, not make the decisions. The businesses that get the most from it set a few simple rules, and stick to them.

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- ◆ **Nothing goes to a customer unread.** AI drafts, a person sends, at least until you trust a particular job completely.
 - ◆ **Money needs approval.** No ad budget, discount or order changes without a person saying yes, within a limit you set.
 - ◆ **Check the facts.** AI can sound sure and still be wrong. Prices, measurements, regulations and dates always get checked.
 - ◆ **Protect customer details.** Use business-grade tools, keep personal details out of free accounts, and follow UK GDPR.
 - ◆ **Respect the rules on marketing.** Cold emails go to businesses, not individuals, with a way to opt out. Claims in ads need evidence.
 - ◆ **Keep one record.** One system for customers, jobs and money, so you, your team and the AI all work from the same facts.

Your 30-day plan

About two hours a week. Do one week at a time, and keep what works.

Week 1 · Foundations

- ◆ Write your business brief (chapter 1) and save it in your AI tool.
- ◆ Try jobs 1, 2 and 3 on real enquiries this week.
- ◆ Set up a missed-call text on your phone system.

Week 2 · Enquiries

- ◆ Put every open enquiry and quote in one place, with a stage each.
- ◆ Agree your follow-up days and chase every quote over a week old.
- ◆ Start recording a reason for every lost job.

Week 3 · Marketing

- ◆ Set a spending limit on your ad account, or set one up properly.
- ◆ Write and test two ad angles (job 10) for one service, in your real area.
- ◆ Ask three recent customers for a review (job 8).

Week 4 · Jobs and money

- ◆ Tag last month's supplier bills to their jobs.
- ◆ Work out the real margin on three recent jobs (chapter 5).
- ◆ Chase every overdue invoice (job 22) and fix one pricing gap.

By day 30 you'll know which jobs AI is good at in your business. The next step is joining them up, so they run without you starting each one.

Rather it was all set up and joined together?

AEY Systems gives trades and construction businesses one joined-up AI system. We built it first to run our own installation business in East Sussex. Now we set it up for others.

What's included

- ◆ CRM and enquiry follow-up, with instant replies
- ◆ Meta ads managed with AI, within limits you set
- ◆ Cold outreach to commercial clients, approved by you
- ◆ Quotes, jobs and profit per job linked to Xero

How it works

- ◆ A team of AI agents does the legwork
- ◆ You approve every action that matters
- ◆ Your own private dashboard and data
- ◆ We set it up and join it all together

Book a free 20-minute walkthrough

Reply to the email this playbook came with

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