



GroundWise AI

GROUNDING ASSESSMENT

Where AI can give your team **10 hours a week** back.

Prepared for **Northfield Home Services**

HVAC & plumbing · 14 people · Office of 3

Report date: October 2026 · Prepared by Ryan Gaylord

SAMPLE REPORT. Northfield Home Services is a fictional business. Names, figures and findings are illustrative, to show what a Grounding Assessment delivers. Tool costs are estimates; confirm current pricing before purchase.

01 Summary

Northfield's three-person office spends about **20 hours a week** on work AI can take on or speed up: sorting the shared inbox, replying to service requests, drafting quotes, chasing reviews, and answering the same "how do we...?" questions from technicians.

20 hrs per week on AI-ready work today	~10 hrs per week realistic savings [conservative]	\$15.6K net annual value at \$35/hr loaded cost	~4 wks to pay back this Assessment
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Our recommendation: start with **inbox triage and a daily morning brief** for the office manager. It's low-risk, saves about 3.5 hours a week on its own, and uses the Google Workspace you already pay for. Before scaling further, put **your current price list and service details in one dated, current place** — today they live in a 2024 PDF and two people's heads, and every other workflow depends on them.

02 What we heard

- "Mornings are just digging out of the inbox. By the time I've sorted it, the phones have started."
- "Half of the service requests ask the same three questions — price for a tune-up, when can you come, do you do X."
- "Quotes sit for days because only Dave knows how to price the bigger jobs."
- "We know reviews matter but nobody remembers to ask."
- "New techs text me all day asking where things are and how we do things."

03 Your workflow map

Each recurring task was scored 1–3 on five questions – *how often, how long, can it be taught, can it be checked quickly, does it need a specific person* – then checked for blockers.

WORKFLOW	WHO	SCORE	BLOCKERS	TIER	HRS/WK NOW	EST. SAVED
Inbox triage + morning brief	Office mgr	14	None	DEPUTIZE	6	3.5
Service-request replies [pricing, availability, FAQs]	Office mgr, CSR	13	Quoting non-standard jobs	DUET	5	2.5
Post-job follow-up + review requests	CSR	13	None	DEPUTIZE	2	1.5
Technician "how do we...?" questions	Office mgr	12	None, once SOPs exist	DEPUTIZE	3	1.5
Quote drafting [larger jobs]	Owner	11	Pricing judgment	DUET	4	1.5
Customer complaints & callbacks	Owner	8	Relationship	DEFEND	2	0
Pricing decisions on large jobs	Owner	7	Judgment; costly mistakes	DEFEND	—	0
Total					22	10.5

DEPUTIZE AI does it; a person spot-checks. **DUET** AI drafts; a person decides. **DEFEND** Keep it human.

04 Effort vs. impact

	LOW EFFORT	HIGHER EFFORT
HIGH IMPACT	Do first - Inbox triage + morning brief - Review-request follow-ups	Plan next - Service-request reply drafts (needs a current price list first) - Technician knowledge assistant (needs SOPs)
LOWER IMPACT	Quick wins - Meeting-notes summaries for the Monday huddle - Standard reply library (5 templates)	Later Quote drafting assistant for larger jobs (after pricing rules are written down)

05 Context readiness

AI is only as good as the information it can reach. This is where Northfield's information lives today, and what needs to change for agents to use it well.

INFORMATION	LIVES TODAY	READY?	FIX
Services & pricing	2024 PDF + owner and office manager	No	One current, dated price page (Week 1)
Customer history	Field-service software + Gmail	Partly	Keep in field-service software; link from hub
Scheduling rules (zones, job lengths)	Office manager's head	No	Half-page written rules
How we work (SOPs)	A few Google Docs, mostly out of date	Partly	Write the top 5 in a Knowledge Hub
Brand voice & reply examples	Sent folder	Partly	Company Profile page with 3 example emails
Financials	QuickBooks	Yes	Leave as is – agents don't need access yet

Readiness: Medium. Two short writing tasks – a price page and scheduling rules – unlock most of the savings above.

06 Recommendations

RECOMMENDATION	SOLVES	EST. COST	SETUP	SAVES/WK
AI assistant in your existing Google Workspace with an inbox-triage routine and 7am morning brief	Inbox triage	Often included in current plan or ~\$20–30/user/mo add-on for 1 user	Low	3.5 hrs
Automated review request sent 2 days after a job is closed in your field-service software	Reviews	Built-in feature or ~\$20/mo automation tool	Low	1.5 hrs
Grounded reply drafts for service requests, using the Company Profile, price page and scheduling rules	Service replies	Same AI assistant	Medium	2.5 hrs
Team knowledge assistant answering technician questions from the Knowledge Hub only	"How do we...?"	Same AI assistant or a Notion workspace (~\$10–20/user/mo)	Medium	1.5 hrs

Costs are estimates for planning; confirm current vendor pricing. Northfield owns and pays for all accounts directly.

07 Your return

INPUT	VALUE
Hours saved per week (conservative)	10
Loaded hourly cost of office staff	\$35
Working weeks per year	48
Annual value of time saved	\$16,800
Added software per year (estimate)	-\$1,200
Net annual value	\$15,600

Estimates, not guarantees. Savings depend on adoption and review time. The freed time is most valuable if it goes to faster quote turnaround and more booked jobs.

08 Your 2-week quick start

WEEK 1 · GET GROUNDED

1. Write a one-page **Company Profile**: services, service area, tone, 3 example replies, hard rules (e.g. never quote over \$1,500 without Dave).
2. Publish a **current price page** with a "last updated" date. Retire the 2024 PDF.
3. Write half a page of **scheduling rules**.
4. Turn on the **inbox-triage routine**; office manager reviews every sort for 5 days.

WEEK 2 · FIRST WINS

1. Start the **7am morning brief**: today's jobs, urgent emails, open quotes.
2. Turn on **automatic review requests** after closed jobs.
3. **Measure**: track inbox time for one week vs. the 6-hour baseline.
4. Decide on workflow #2: **service-request reply drafts**.

What to watch for

- **Reviewer time.** If checking the AI's work takes longer than doing it, simplify the task or narrow it.
- **Out-of-date context.** Most wrong answers trace back to an old price or a missing rule. Fix the page, not the AI.
- **Customer data.** Keep payroll and financial records out of the assistant's reach. Give access only to what each workflow needs.

09 Next steps

You can run this plan yourselves — everything above is written to be followed without us. If you'd rather move faster, GroundWise can build the first workflow with you.

Grounded Starter: inbox triage + morning brief, built and tested with your team

Company Profile and price page set up, the routine configured in your Google Workspace, tested on real emails, and a one-page operating guide for your office manager. About 2–3 weeks.

Your Assessment fee is credited in full if you book within 30 days.

Questions: hello@groundwiseai.com · groundwiseai.com · [@GroundWiseAI](https://twitter.com/GroundWiseAI)