THROUGHLINE OPERATIONS

AI & Subscription Audit

Prepared for **Northend Mechanical** — HVAC and plumbing, Hamilton (fictional)

Engagement: Audit — $999 CAD + HST · Fixed scope · Delivered in 7 days

Reviewed: 9 subscriptions · 4 repeating office jobs · one full workday · 6 staff, 4 vans

ILLUSTRATIVE SAMPLE. Northend Mechanical is a fictional business created to show the format and depth of this deliverable. Every figure is invented to be realistic; none is a client result. No performance is claimed or implied.

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1. The verdict

Everything in this report rolls up to three sentences. If you read nothing else, read these.

What is costing you the most: Calls that come in while all four vans are on jobs go to voicemail, and the owner returns them after 7 p.m. — by which point roughly one in three has already booked someone else.

What to stop paying for: Four of nine charges are either unused since spring, duplicate something you already own, or — in the case of the $300 directory ad — produced no job we could trace. In this illustrative inventory, cancelling them reduces recurring spend by $389 a month ($4,668 a year).

What to fix first: Your phone plan already includes missed-call text-back; it is switched off. We wrote the exact reply, the 11:00 and 14:00 check in Jobber, and the rule for what still rings the on-call mobile. You flip the switch — nobody sells you a $200-a-month “AI receptionist.”

Keep	Cancel	Change	Recurring spend removed / year	The one leak to fix first
4	4	1	$4,668	Calls missed 9–4

Illustrative sample — invented shop. “Spend removed” counts only charges actually cancelled. Time estimates live in §6 with their arithmetic, and are estimates, not promises.

2. Your workday, mapped

We walked one ordinary Tuesday from the first message to the last invoice. This is what it looked like, and where it snagged.

Time	What happens	Tool used	Who	Friction
6:45	Check overnight voicemails, texts, website form, Facebook messages	Phone, Messenger, Gmail	Owner	Four inboxes, no single list; two enquiries missed until noon
7:30	Dispatch day’s jobs; two changes by phone	Jobber, texts	Owner	Changes texted, not logged — one van went to a cancelled job
9:00–4:00	Crews on site; office phone rings ~14 times; 6 go to voicemail	Phone	Nobody	No text-back; callers try the next shop
4:30	Crews text “done” with photos	Texts	Techs	Photos in five phones; invoices wait for owner to assemble
7:00–9:30	Return calls, write 3 quotes, build 5 invoices, schedule tomorrow	Jobber, QuickBooks, phone	Owner	This is the work that comes home

Work that comes home: 9 hours a week, as stated by the owner.

3. Subscription and tool inventory

Every tool you pay for, what it is actually used for, and a verdict on each. A verdict is one of three words.

Tool	$ / mo	Used for	Verdict	Why	Action
Jobber (Grow)	169	Quotes, scheduling, invoicing	**KEEP**	Core system; used daily by all staff	Turn on automated quote follow-up (already included)
QuickBooks Online	90	Books, payroll	**KEEP**	Bookkeeper depends on it	None
Google Workspace ×3	60	Email, calendar, Drive	**KEEP**	Shared calendar is the dispatch board	None
VoIP phone plan	95	Office line, 2 mobiles	**CHANGE**	Missed-call text-back is a $0 feature not switched on	Enable text-back + business-hours routing
Dropbox Plus	24	Job photos	**CANCEL**	Duplicates Google Drive; 3 GB used	Move photos to Drive; cancel
Mailchimp	45	Newsletter	**CANCEL**	Last send: March; 212 contacts	Export list to Jobber; cancel
Canva Pro	20	Flyers	**CANCEL**	No login since April	Cancel; free tier covers it
Directory ads	300	Leads	**CANCEL**	Zero attributable jobs in 6 months (asked every caller)	Cancel at renewal; keep free listing
Fleet GPS	110	Van tracking	**KEEP**	Used for dispatch and mileage	None

	Monthly	Yearly
Total before audit	$913	$10,956
Total after actions	$524	$6,288
Difference	**$389**	**$4,668**

Illustrative sample — invented figures.

4. The three things costing the most

Ranked by what they cost you in lost work, money, and time — in that order.

1. Calls nobody can answer between 9 and 4

What happens now: About six calls a day reach voicemail while crews are on site. They get returned in the evening.

What it costs: Owner’s log, two weeks: 61 voicemails; 19 had already hired another company by the time he called back. At the shop’s stated $340 average ticket, those 19 enquiries represented about $6,460 of potential job value. This plan does not claim those come back; it is built so the next 61 get a reply before they hang up. (Invented shop — not a result Throughline has produced.)

The fix: Turn on missed-call text-back in the existing phone plan ("Sorry we missed you — reply with your address and the problem and we'll confirm a time"). Replies land in Jobber as requests. Emergencies still ring the on-call mobile.

Who owns it: Owner switches it on; office admin checks requests at 11 and 2.

2. Invoices assembled at night from five phones

What happens now: Techs text "done" plus photos; the owner rebuilds each job in Jobber after dinner.

What it costs: ~4 hours a week of owner time; invoices go out 2–4 days after the job.

The fix: Configure each job in Jobber to prompt invoicing at completion. Before leaving site the tech completes the visit and attaches the required photos; Jobber moves the job into the invoice queue instead of texting the owner. Where the site has no signal (a Hamilton basement is not Wi-Fi), photos go to one shared Drive folder named by job number and the tech completes the visit from the van. Lead tech verifies the first 10 jobs.

Who owns it: Lead tech trains the crew (30 minutes); owner approves invoices at 4:30, not 8:30.

3. Paying $389 a month for tools nobody opens

What happens now: Four subscriptions renew automatically; three have not been opened since spring.

What it costs: $4,668 a year in total — of which $3,600 is directory ads with no job attributed to them in six months of asking every caller where they found you. The other three ($89 a month) are the kind any bookkeeper could catch; the directory line is the one that took two weeks of tracking to prove.

The fix: Cancel per §3. Nothing to build.

Who owns it: Owner, this week, with the bookkeeper confirming the charges stop.

5. What to do first — the 90-day sequence

In order. Each step is small enough to finish. Nothing in weeks 3–12 starts until weeks 1–2 are done.

Weeks 1–2 · Stop the bleeding

- Cancel Dropbox, Mailchimp, Canva; set directory ads to not renew.
- Switch on missed-call text-back and business-hours routing in the phone plan.

Weeks 3–6 · Fix the first bottleneck

- Crew marks jobs complete in the Jobber app on site, photos attached.
- Owner approves invoices in one daily pass at 4:30.
- Day-90 target: at least 8 of 10 completed jobs invoiced the same day. A target, not a forecast.

Weeks 7–12 · Make it hold

- Turn on Jobber's automated quote follow-up (day 2 and day 5).
- Review the four measures in §6 on day 90; decide whether anything needs building.

Where Throughline fits: no additional build is recommended in weeks 1–6 — those steps are settings and habits. The audit is the diagnosis you already paid for: the leak found and counted, the spend verified line by line, the existing features chosen over new software, an owner named for each step, and the four measures below. Implement these before paying anyone — including us — to build more. If day 90 still shows requests dying between the phone and Jobber, that is the one thing worth a build, and the $999 is credited toward The Map.

5b. Monday morning — the implementation sheet

Exactly what changes, where the setting lives, who does it, and how you know it worked. Nothing here requires new software.

Change	Where (click-path)	Owner	Deadline	How we verify
Missed-call text-back ON, business-hours routing ON	Phone plan admin → Call handling → Missed call SMS → paste the reply text below → Routing: 9–4 office line, after-hours on-call mobile	Owner	Mon, day 1	Call the office from a person phone at 10:00; confirm the text arrives within 60 s
The reply text	“Northend here — sorry we missed you. Reply with your address and what’s going on and we’ll confirm a time. Emergency? Call [on-call number].”	Owner (paste as-is)	Mon, day 1	Same test call
Requests checked twice daily	Jobber → Requests → filter Today; 11:00 and 14:00 calendar reminders	Office admin	Tue, day 2	Two reminders exist; reques older than 3 h = 0 at each check
Cancel Dropbox, Mailchimp, Canva	Each account → Billing → Cancel; export Mailchimp contacts CSV first, import to Jobber Clients	Owner + bookkeepe r	Fri, day 5	Bookkeeper confirms no charge on the next stateme
Directory ads → no renewal	Vendor account → Subscription → Turn off auto-renew; keep free listing	Owner	Before renewal date	Renewal email says ‘cancell
Jobber: invoice on completion	Jobber → Settings → Work Settings → Invoicing → ‘Remind to invoice when job closes’; Jobs → require photo on completion	Owner	Week 3	First 10 jobs: invoice in queu before tech leaves site
No-signal fallback	Drive → shared folder ‘Job photos’ → subfolder per job number; tech completes visit from the van	Lead tech	Week 3	Zero photos on personal phones in the week-4 spot check
Quote follow-up automation	Jobber → Settings → Quote follow-ups → day 2 and day 5, on	Owner	Week 7	Sent-quote log shows follow ups firing
Day-90 review	Pull the four §6 numbers; 30-minute call	Owner + Throughlin e	Day 90	Numbers on one page; decision: build or don’t

Menu names are current as of the audit date and may move; the setting names will not. Illustrative sample — invented shop.

6. What we measure

Four numbers, taken before anything changes, so the plan can be judged honestly at the review date.

Measure	Baseline (today)	How we got it	Target at day 90
Response time — enquiry to first reply	≈ 9 hours	Timestamps on 61 voicemails vs callback log, 2 weeks	Under 15 minutes (automated), same-day human
Capture rate — enquiries that become quotes	42 / 61 = 69%	Owner's callback log	85%
Handoff rate — jobs completed without the owner touching them	1 in 10	Jobber job history, 30 days	6 in 10
Invoice lag — job done to invoice sent	2.8 days	Jobber timestamps, 30 days	Same day

Illustrative sample — targets are targets, not forecasts.

Hours-per-week estimate: evening invoicing 4 h + evening callbacks ~1 h = about 5 h of the stated 9 that this plan addresses. The remaining 4 (quotes, scheduling) are not addressed and are not counted. An estimate, not a promise.

7. What we did not recommend, and why

- An AI phone answering service ($150–$400/mo): at this call volume, test the text-back already included in the plan first, measure response and quote-conversion for 90 days, then reassess.
- Switching from Jobber to another platform: no switch is justified by what this audit found; the gap is field adoption and the Jobber→QuickBooks sync, not the platform.
- A website rebuild: the form works; enquiries were missed because they sat in a fourth inbox, which text-back and one daily check resolves.

8. Scope, guarantee, and data

What was reviewed: one workday walkthrough, nine subscriptions, and the enquiry-to-invoice path. Anything outside that list was not audited.

Guarantee: If the audit doesn't give you a clear keep, cancel, or change answer for every subscription we review, we finish the work at no charge.

Credit: The $999 fee is credited toward The Map ($1,999) for 90 days from delivery.

Data: We review statements and screens the client shows us. We request no passwords. Notes are taken with a transcription tool with the client's consent; deletion can be requested at privacy@throughlineoperations.com.

Reminder: Northend Mechanical is fictional. This document shows the format of the audit deliverable, not a client outcome.

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