From 1 Hour to 10 Minutes: How AI Automation Slashed Fence Proposal Creation Time by 83%

Summary:

Small to medium-sized businesses can cut their proposal/estimate creation time by 83% by adopting AI automation processes that create a complete proposal or estimate for the estimator. With this time saved, business owners can do more prospecting for new customers.

Problem:

A fence company that installs, repairs and replaces fences was losing opportunities to get new contracts due to a small workforce that was busy doing the actual work, and falling behind on getting timely estimates and proposals to prospective customers. Often, by the time the owner sent the estimate, the prospect told him they found another fence company to do the work.

The owner filled several roles, but his primary work was joining his crew doing the actual fence work. He spent five to seven hours each week manually writing proposals without a fixed format or template. After losing several opportunities worth high five figures each, he decided to explore an automatic process to create the proposals for him, using the information he provided.

Approach:

The fence company owner walked Tyto AI Consulting through a typical estimate. They visited the site and gathered the prospect's requirements for a new fence, which took an hour and a half. While this process cannot be automated or trimmed back timewise, the proposal/estimate creation could, and this was where Tyto AI Consulting offered a solution after watching the owner manually write an estimate that took an hour and 20 minutes.

Using two automation tools and ChatGPT, Tyto developed an online form for the owner to access either by a computer, tablet or mobile phone. The owner provided the necessary information that Tyto AI used to create the form fields.

New Fence Estimate Form

Form that will populate the data table to build out the proposal

Name

Address

Phone Number

Email

Status

Set this to "Ready for Automation" to start the process

Fencing: Type

Fencing: Linear Feet

Attachments

Upload any attachments for the estimate

[Airtable Form To Populate A Database]

Once the fence company owner put in the information and submitted the form, a third-party tool and ChatGPT were triggered to start the proposal process. ChatGPT took the form and created a proposal document and uploaded it to a secure online drive.

The total time for filling out the form, submitting it to the third-party tools and ChatGPT, plus automatically creating and saving the completed form is down to ~ 8 to 10 minutes.
The fence owner now must review the proposal, make any changes and email it to the prospect.
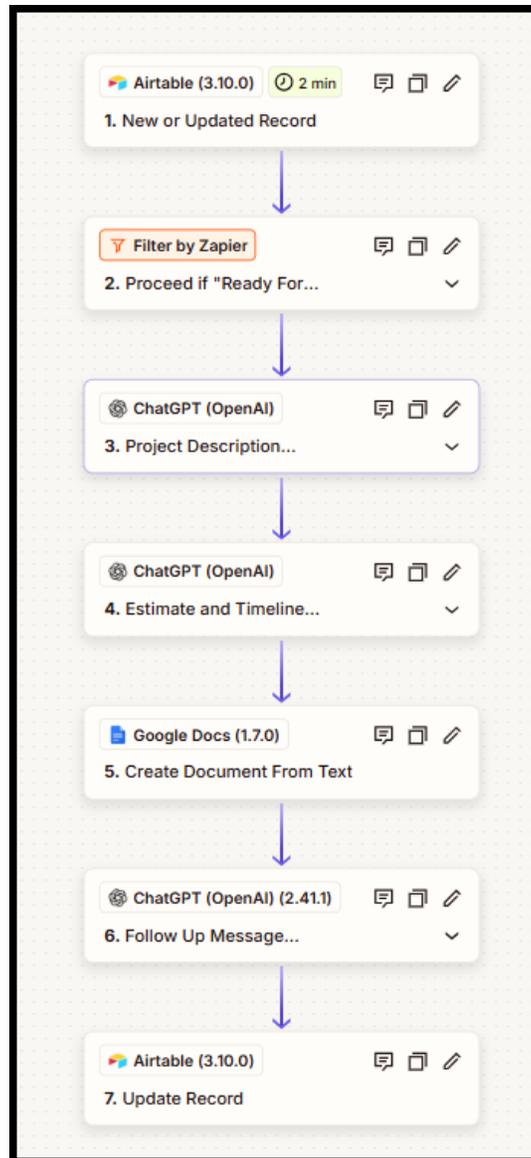
[AI Automation Workflow In Zapier]

The total time saved per week is about 5.8 hours or ~83%. The owner is using the saved time to do more prospecting for new customers. Since implementing this proposal automation, he has gotten eight new fence customers in about three weeks. Each new fence job is averaging $3000 - $5000 for the company.

Conclusion:

Automating repetitive tasks and performing a quality control check to ensure the output is accurate frees up business owners and employees to do more meaningful work to increase sales opportunities and revenue.

https://www.tytoaiconsulting.com/ | nmcdonald@tytoaiconsulting.com