

THE EVERYTHING · FIELD GUIDES FOR TRADE BUSINESSES

The **AI** Plumber Playbook

How to run a plumbing business in the age of AI — and
out-earn outfits three times your size.

THE COMPLETE SYSTEM · NO FLUFF · FREE TO SHARE

THE EVERYTHING

Read this first

Ten years ago, running a proper plumbing business meant hiring an office person, paying a bookkeeper, and still answering the phone at 7pm with your dinner going cold.

Today, a solo plumber with the right setup books more jobs, quotes faster and gets paid quicker than a twelve-van outfit across town — and spends zero nights on paperwork.

He's not smarter than you. He's not a better plumber. And he's definitely not a computer person — one of the best we've seen was quoting with a pad and a pencil two years ago. He just worked out one thing before everyone else: **the boring half of the business — the calls, the quotes, the invoices, the chasing, the filing — can now do itself.** So he put his energy where the money is: on the tools, and on the customer.

This is the playbook for how he does it. No "50 prompts to copy". No tech-bro nonsense. The actual system — how to think about it, what to set up, in what order, and the mistakes that make good plumbers quit before it clicks. The stories in here are real trades and real small businesses we work with — names left out, numbers left in. Read it start to finish and you'll run a tighter, more profitable plumbing business than you do right now, even if you never spend a cent on software.

A STRAIGHT WORD ON YOUR LICENCE

Nothing in here decides who's urgent, signs off gas or backflow work, or replaces a licensed plumber's judgement. It carries the *admin*. The plumbing — and the responsibility — stays yours, start to finish.

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01

CHAPTER ONE

The New Playing Field

A customer with water coming through the ceiling can't tell if you're a good plumber. Not in that moment. They judge you on what they can see — and that's where most plumbers quietly lose work they'd have walked.

When a pipe lets go at 6pm, the homeowner doesn't ring one plumber. They ring five, off the top of the Google list, and the job goes to whoever gets three things right first:

- 1 Did you actually pick up — or call straight back?**
The burst-pipe job goes to the first plumber who answers, not the best one. Ring out to voicemail and it's lost before you've quoted a cent.
- 2 Did the quote turn up fast, and look the part?**
A tidy quote for the hot-water swap in an hour beats a number on the back of a card three days later — every single time.
- 3 Was dealing with you easy?**
Clear updates, no chasing, no "sorry mate, forgot to send that". Easy-to-deal-with wins the bathroom reno after the tap washer.

Notice what none of those are about? How good a plumber you are. All three are about **admin and communication** — the exact stuff you hate and never have time for at the end of a day on the tools.

And here's the bit nobody's telling you: the other side of the table already runs on AI. The insurer checks every line of your make-safe invoice against their scheduled rates the second you upload it. The big commercial mobs feed their tenders through it. The franchise drain outfits have AI answering their phones right now. The question isn't whether AI comes into plumbing — it's already in. The question is whether it's working *for* you or *against* you.

The good news? This is the first time in history the technology favours the small operator. The big firms have to run committees, rollouts and training programs. You can decide on a Tuesday and be running by Friday. The playing field just flipped: the small, fast, well-organised plumber can now look and perform like the big firm — without the big firm's overheads.

"But I'm not a computer person"

Neither are the trades doing this best. One of the fastest adopters we've seen is a builder with 26 years on the tools who only picked up a computer three years ago. His words: *"Don't worry about spelling. Don't worry about grammar."* If you can send a text or leave a voice message, you can run everything in this playbook. Being good at typing was the old requirement. Being able to say what you want is the new one — and plumbers are already good at that.

\$300–1,000
+ per month

What most trade job-management software charges — and it *still* makes you do the typing. One owner we know was paying a grand a month, some months three, for software his crew barely used. Keep that number in mind: everything in this playbook either replaces that spend or makes it earn its keep.

The firms three times your size are slow because they're big. That's your opening. This playbook is about walking through it.

02

CHAPTER TWO

Think AI-First

Before we touch a single tool, we need to fix how you think about this — because the biggest mistake isn't buying the wrong software. It's bolting AI onto your old way of working and wondering why nothing changed.

Every process in your business was built on one assumption: a human has to do each step. Someone answers the phone. Someone types the quote. Someone chases the invoice. Someone files the compliance certs. Your whole day is shaped around that assumption — and that assumption just died.

Don't automate your old process. **Re-draw it** — with the AI touching everything first, and you supervising. Three mental shifts, every one of them learned by a real trade business we work with:

Shift one — delegate outcomes, not steps

Stop thinking "which buttons do I click". You now talk to your business the way you'd talk to a good offsider: say the outcome, let it work out the steps. One owner cancelled an invoice, re-issued it pro-rata and emailed the customer by saying exactly that, in one sentence. Another buys parts by sending one message from the supply-house counter — *"I'm at Reece grabbing this fitting for the Smith job"* — and the purchase order, the expense and the books sort themselves. His words: *"It's one text message that just does heaps of data."*

Shift two — AI first, you second

Old way: you do the work, maybe a tool helps. New way: the AI does the first pass of everything, and you approve, tweak or overrule. The quote is drafted before you sit down. The reply is written before you open the email. The call is answered before you're out from under the house. One customer described the routine: *"Nine times out of ten it's perfect. Just go — yep, send."* Your job shrinks to ten seconds of judgment, not forty minutes of typing. (And no — you don't hand over the keys on day one. It asks permission for everything at the start, especially money. You loosen the leash as it earns it — Chapter 9.)

Shift three — corrections are investments

With normal software, you fix the same mistake forever. With AI, you fix it once. A plumber tells it a standard hot-water changeover includes the tempering valve and the new flexi set — it answers, *"I'll remember that from now on."* And it does. Correct *"copper"* to *"PEX"* for a particular customer's job, and it never gets it wrong again. Every correction compounds. Six months in, it quotes like you, writes like you and knows your rules — because you taught it, once.

The re-imagining exercise

Walk your business and ask one question about every interaction: *"What would this look like if the AI touched it first?"*

INTERACTION	THE OLD WAY	AI-FIRST
Customer rings at 7pm, no hot water	Voicemail. Job lost to whoever answered.	Answered, captured, booked — quote drafted before breakfast.
Delivery from the supplier arrives short	You notice Thursday, chase Friday, forget Monday.	Flagged the day it lands, chased automatically — you hear only if they don't fix it.
Price-list update lands	Buried under 200 emails. Old rates on your next quote.	Extracted, applied to your rates — one line: "prices changed on six items."
Job finishes	Invoice "tonight". Review never asked for.	Invoice sent from the driveway. Review asked while they're still rapt. Service reminder set.

Every chapter from here is just this exercise applied to one part of your business. You don't become an office worker. You become the owner of a business that runs itself around you.

03

CHAPTER THREE

Never Miss a Job Again

Let's start with the leak that costs you the most and hurts the least — because you never see the bill.

Plumbers are the worst offenders for this, and you know it. You're on your back in a subfloor, both hands on a drain snake, phone ringing in your pocket. It rings out. That caller — a blocked drain, a burst pipe, a no-hot-water job worth real money — rings the next plumber on the list. Gone.

\$40,000
+ a year, unseen

Say you miss four calls a week (most flat-out plumbers miss more). Say one in three was real work. Say your average job is \$800. That's roughly one lost job a week walking straight to whoever picked up next — every year. You never feel it, because you never knew the phone rang.

And the kicker: the customer who rings you doesn't leave a voicemail. They ring the next bloke. **Voicemail is where jobs go to die.** The old fix was "answer more calls". The AI-first fix is bigger — because a call is really two problems, and most plumbers only ever think about the first.

Problem one — the call you couldn't take

You're under a house, up a ladder to a gutter downpipe, or driving. An AI receptionist answers in your business's name, 24/7, sounds normal on the phone, gets the job details — *what* (blocked drain, burst pipe, no hot water, gas smell), *where*, and *how bad* — books it into your calendar, flags a true emergency to the top, and texts you a summary before you're back on the ground. It doesn't take smoko, doesn't get sick, and costs a fraction of a person.

Problem two — the call you took, and half-forgot

Be honest: how many times have you said *"yeah mate, I'll get you a quote for the re-pipe by Thursday"* from the driver's seat — and by the next job it's gone? You're not disorganised. You're busy, and your head is your filing system. This is where AI-first changes what a phone even is:

- **Every call is captured.** Recorded, transcribed, filed against the job. Six weeks later, when the customer says "but you said no charge for the call-out", you can check what was actually said.
- **The promises come out automatically.** "Quote by Thursday." "Ring the supplier about the shower base." Pulled out of the conversation — you don't write anything down, because you were driving.
- **The promises chase you.** Thursday morning: "You told Dave he'd have his re-pipe quote today — want me to get it moving?" The follow-up your competitors never send now happens every time.
- **And if it has what it needs, the work starts itself.** The call captured the job, the address, the scope — so the quote isn't a reminder on a list, it's a draft waiting when you pull over.

What to insist on — however you solve it

- ✓ Every call answered in your business's name — including 7pm, including Saturday.
- ✓ A searchable transcript of every call — "what did we agree about the vanity?"
- ✓ Promises land somewhere that chases you — not a notebook, not your memory.
- ✓ Job details from the call flow into the job — not re-typed three times.

THE DIY VERSION

Forward your number to a call-answering service with a tight script — name, suburb, what they need, "he'll call back within the hour". And voice-memo your promises before you drive off. That alone wins jobs.

THE DONE-FOR-YOU VERSION

An all-in-one AI phone system (the sort of thing The Everything does) covers the whole standard — answered, transcribed, promises chased, quote drafted from the call. Either way: never let a call — or a promise — hit the floor.

04

CHAPTER FOUR

Quote Before You Leave the Driveway

Second-biggest leak: the quote that goes out "tonight".

Here's what actually happens. You do the site visit, you say "I'll get that over to you tonight" — then you get home knackered, the kids need feeding, and the quote gets done at 9:30pm. Or tomorrow. Or Thursday. Meanwhile the customer got two other quotes the same day they saw you.

Speed wins quotes

Not price. Speed. The plumber whose quote lands while the customer's still standing in the driveway wins a shocking amount of the time — even when he's dearer. A fast, professional quote signals the one thing the customer wants: this bloke's got his act together.

The old advice was "use templates, quote from your phone". Forget that. AI-first quoting means **the AI builds the quote. You check it.** Here's what that looks like in a real plumbing business today.

- **You talk, it builds.** Walk the job, dictate what you see — *"re-pipe the bathroom in PEX, swap the vanity tap and shower mixer, replace the failed flexi hoses, reset the toilet, half a day plus materials"* — and it turns that into a priced, itemised, professional quote on your template.
- **It prices from YOUR history.** Feed it your past quotes and it learns your rates, your margins, how you break a job down. Different rates for a landlord vs a one-off homeowner? It keeps them straight.
- **It knows your rules — because you taught it once.** What "reinstate to the meter" means in linear metres, your standard changeover inclusions. Teach it like an apprentice; unlike an apprentice, it never forgets.
- **It catches what you forgot.** A real trade business fed a job report in, and the AI's quote came back including the travel a paid estimator had left off the same job. It doesn't get tired at 9:30pm. That's the point.
- **It can even go get prices.** Missing a current price on a tempering valve? It checks the supplier and slots it in — you correct it if it grabbed the wrong spec, and it remembers forever.

2–3 days
→ half a day

A builder we work with — 26 years on the tools, barely touches a computer: *"Quotes that used to take me two or three days, my AI does in half a day. I did one yesterday that would've taken two days — sent it off the same day."* Pricing came in "pretty much on par" with his own numbers, because it learned from his past quotes.

Then the bit everyone skips — **the follow-up**. One message, two days later: *"Just checking you got the quote for the re-pipe — happy to walk you through it."* That single message wins more jobs than dropping your price ever will, because most competitors never send it. AI-first, the follow-up isn't a habit you build. It's a thing that just happens.

THE POINT ISN'T THE SOFTWARE

It's the standard: same-day, professional, priced from your own numbers, followed up. A plumber with a notepad who hits that standard beats a plumber with an app who doesn't. The AI just makes the standard effortless.

05

CHAPTER FIVE

Get Paid Without the Awkward Chase

You've done the work. Now you've got to get the money — which for most plumbers is a second unpaid job nobody warned them about.

7 days
not 47

The average trade invoice gets paid around six weeks after it's sent. Not because customers won't pay — most just forget, and you feel weird nagging them. So the money sits out there while you're funding materials on the card.

The chasing is a **system** problem, not a people problem. Fix the system and you never have the awkward conversation — or send that cringey "just following up on that invoice mate" text — again.

The system that gets you paid in a week

1

Invoice the second the job's done — on site

Every day you wait is a day added to when it's paid. At first, it's one sentence from the ute: "invoice the Wilson job." Line items from the quote, your terms, their email. Done.

2

Make paying stupidly easy

A "pay now" link gets paid faster than "here are my bank details". Remove every step between them wanting to pay and it being done.

3

Automate the polite nudges

A friendly reminder at day 3, 7 and 14 — automatically, so you never send it. Then a monthly statement, and a flag to you only when someone's genuinely overdue. Worth thousands in cash flow.

4

Escalate the tone only if you have to

Most pay on nudge one or two. The rare straggler gets a firmer — still professional — message. You stay the good guy the whole way.

And because money is money: this is the one place you keep the AI on a short leash at the start. It drafts, you approve, every time — until you've watched it be right for a month and tell it to stop asking.

06

CHAPTER SIX

The Inbox That Runs Itself

Your inbox is where quiet money leaks out and stress leaks in.

Supplier statements, customer questions, materials orders, price-list updates, the strata manager chasing a report — all mixed in with junk, all landing while you're up to your elbows in a job. One store manager we work with started with a backlog of 24,000 emails: *"I'd read one email, it'd get lost. I wouldn't even be able to find it again."*

The problem isn't too much email. It's that the important stuff and the noise look identical until you stop and read it all — and you don't have time to. At first, the inbox becomes something that's already handled by the time you look:

- **Triaged.** The three emails that matter today float to the top, flagged with why — "this one's a deadline, you must check it." The tyre-kickers get filtered before they cost you a thought.
- **Drafted.** Routine replies — "yes we do gas", "we're booked till Tuesday", "here's rough pricing" — written and waiting. You glance, tweak, send.
- **Answered on demand.** That same manager now just asks, "what's the current price update from the supplier?" — and it finds the latest instantly, even joining a manufacturer to the distributor who replies under a different name.

THE PART NOBODY EXPECTS — IT GUARDS YOUR MONEY

Because the AI reads everything, it catches things. One business: *"It's already saved me thousands in mis-ordered products — it said, hold on, based on your past jobs you probably want this one."* Another had a supplier accidentally invoice at a 50% discrepancy — flagged automatically before it was paid.

The point isn't a cleverer inbox. It's that a solid enquiry never again dies at the bottom of a pile of supply-house statements.

07

CHAPTER SEVEN

Your Digital Office Manager

Every plumbing business has an office manager. In most, it's you — doing it badly at 10pm, because there's no one else.

+20 jobs
in one week

One building crew's admin person went on leave for a week. The owner: *"We haven't had her in the office for a week, and it's helped us do her job — and we've had probably an extra 20 jobs come in through this week."* Not survive the week. Their biggest week.

The office manager's job is the connective tissue: what's on today, who's expecting you when, where are the photos from the Henderson job, where's that compliance cert, did the parts get ordered. You don't need to hire that person. You need the system that person would run.

The morning brief

Before you turn the key: today's jobs in order, who to chase for payment, what's waiting on materials, and the one thing that'll bite you if you forget it. Two minutes with a coffee — and your crew knows too.

Job files that build themselves

Every photo, quote, invoice and site note attaches itself to the right job — so when the customer rings in eight months about the same hot-water unit, the whole history's there, not scattered across your camera roll and three text threads.

Compliance without the dread

The certificates that come with the trade — the compliance certificate for the work, gas and backflow paperwork where it applies — get prompted, captured against the job, and kept where you can actually find them. Never invented for you, and never a substitute for your licensed sign-off — just stopped from going missing.

If it's not in the system, it doesn't exist — so your head can hold the plumbing instead of the paperwork.

08

CHAPTER EIGHT

Look Twice as Big as You Are

Here's a secret the big firms rely on you not knowing: most of "looking professional" is presentation — and presentation is now nearly free.

A one-van plumber and a fifty-person firm can send the identical, spotless, branded quote. The customer can't tell which is which — so the small operator who bothers gets treated like the big one, and can charge like it. First presentation is where the price objection is won or lost.

The referral flywheel — on purpose, not by accident

- R Retain** — make the whole job easy and clear, so they'd have you back without thinking twice.
- R Review** — ask for the Google review at the moment they're happiest, right after a job well done, automatically, with the link. Reviews win you the next ten jobs while you sleep.
- R Refer** — happy customers refer if you make it easy and remind them. "Know anyone else who needs a hand? We'd look after them like we looked after you."
- R Resell** — the hot-water service due next year; the other job they mentioned on the walkthrough — it's in the call transcript, remember. A reminder at the right time turns one job into three.

This engine is pure gold and almost nobody runs it — because it means doing the boring thing at the perfect time, every time, forever. Which is exactly what a system does perfectly and a busy human never does.

START TODAY — EVEN WITH ZERO TECH

Ask every happy customer for a review before you leave the job, and send tidy before-and-after photos with every invoice. The flywheel doesn't care how it's turned. It just needs turning.

09

CHAPTER NINE

The 30-Day Switch

Everything above works. The reason most plumbers don't get it working is they try to do it all at once, get overwhelmed mid-job, and go back to the old way. So: one thing at a time, without stopping work.

1

Week 1 — Stop the biggest leak: the phone

Every call answered, every call captured, promises pulled out automatically. This one starts paying for the whole exercise immediately, and it's the one you'll feel first.

2

Week 2 — Fix quoting

The AI drafts from your dictation and your past pricing; you correct it — and every correction is a lesson it keeps. Same-day quotes, with the two-day follow-up. Watch your win-rate move.

3

Week 3 — Fix getting paid

Invoice-on-job-done, easy payment, automatic reminders — with you approving everything money-related until it's earned the leash. The week your bank balance starts looking different.

4

Week 4 — Hand over the back office

Inbox triaged and drafted, morning brief running, job files building themselves, reviews asked automatically.

Why all four? Because one process never feels like much. One automated process gets a shrug. Three is where the "holy hell" moment happens — because that's when the pieces start talking to each other. The call becomes the quote. The quote becomes the invoice. The invoice becomes the review. That's when it stops being a tool and starts being a system.

The trust dial — how to hand over without losing sleep

You don't trust a new apprentice with the ute on day one. Same here:

1

Weeks 1–2: it asks about everything

Every email draft, every invoice — "here's what I'd send, OK?" You approve, correct, teach.

2

Weeks 3–4: it asks about the important stuff

Routine replies just go; money and new customers still get your nod.

3

Month two onward: it asks about exceptions

You've watched it be right for weeks. Now it runs, and you get the morning brief and the flags. You're still the boss — you've just stopped being the bottleneck.

The mistakes that make good plumbers quit before it clicks

- **Doing all four weeks at once.** Don't. One a week. Each banks a win before you add the next.
- **Bolting AI onto the old process.** If you're still typing everything into the same old software and asking AI to "help", you've missed the point. Re-draw the process (Chapter 2).
- **Treating it like software instead of staff.** Software you configure once and curse forever. This, you teach — and it gets better every week. The trades getting the most out of it talk to it all day, like their best offside.
- **Waiting for perfect.** A rough system running today beats a perfect one you'll set up "when things quiet down". Things never quiet down.



BEFORE YOU PUT THIS DOWN

The 2-Minute Leak Audit

Be honest. Tick the ones that are true right now.

- ☐ I regularly miss calls while I'm working — and I don't know how many jobs it's cost me.
- ☐ I've promised someone a quote or a callback this month — and forgotten until they chased me.
- ☐ My quotes go out "tonight" more often than "on the spot".
- ☐ I don't always follow up after sending a quote.
- ☐ My invoices take longer than two weeks to get paid.
- ☐ I've sent an awkward "just chasing that invoice" message in the last month.
- ☐ My inbox stresses me out, and important stuff gets buried.
- ☐ If a customer rang about a job from last year, it'd take me a while to find the details.
- ☐ I don't ask every happy customer for a review.
- ☐ My compliance certs live in a glovebox, a ute console and three text threads.

0–2

Tight ship. A few tweaks and you're flying.

3–6

You're leaking real money in the boring half — and it's all fixable. Start with Week 1.

7+

Mate, you're doing a second job for free every week. Good news: it's exactly the stuff that's now easiest to fix.

Whatever your number — your biggest tick is your biggest opportunity. Start there.

Want it set up for you?

Everything in this playbook, you can build yourself — and you should, if you've got the time and the patience. Plenty do. If you'd rather it was just done — the AI that answers your phone, captures every promise, builds your quotes, chases your invoices and runs your back office, all in one, working in your plumbing business this week — that's what we build. It's called The Everything.

- ✓ 14-day free trial. Cancel anytime. No lock-in, no contracts.
- ✓ Nothing important — a quote, an invoice, a customer message — ever goes out without you seeing it first.
- ✓ It lives in Microsoft Teams and the tools you already use.

See it working on your own jobs at the-everything-app.com — no credit card to look.

Honest note: this won't fix a broken business, and it won't make the plumbing decisions — that's still you and your licence. What it fixes is the office job you've been doing for free after dark.