THE EVERYTHING · FIELD GUIDES FOR TRADE BUSINESSES

The AI Pool Builder Playbook

How to run a pool-building business in the age of AI

— and win more of the quotes you're already on.

THE COMPLETE SYSTEM · NO FLUFF · FREE TO SHARE

THE EVERYTHING

Read this first

Ten years ago, running a proper pool-building business meant someone on the phone, a bookkeeper, and still working out the pool size, the site costs and the progress claims on a scrap of paper in the ute between site visits.

Today, a small builder with the right setup answers every enquiry the moment it lands, quotes straighter and more honestly, follows up through the months the customer is comparing — and signs more of those three-quote shortlists than a ten-crew outfit across town. And he spends zero nights on paperwork.

He's not smarter than you. He's not a better builder. And he's definitely not a computer person — one of the best we've seen was still pricing jobs on a pad on the passenger seat two years ago. He just worked out one thing before everyone else: **the boring half of the business** — the enquiries, the follow-ups, the honest quotes, the deposits and progress claims, the compliance and handover records — can now do itself. So he put his energy where the money is: on the build, and on turning cautious, quote-shopping buyers into customers who sign, refer, and stay for the servicing.

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 builders give up before it clicks. Read it start to finish and you'll run a tighter, more profitable pool business than you do right now, even if you never spend a cent on software.

A STRAIGHT WORD ON WHAT STAYS YOURS

Nothing in here promises a customer a completion date, guarantees there'll be no surprises when you dig, or decides how the pool gets built — and it never replaces your assessment at the property, your licence, or the standards you build to. It carries the admin. Whether a block will throw up rock or a high water table is a site call; what a build will really cost and how long it takes is a judgement made after a proper look, not a phone promise; who pays what and when is a contract tied to milestones; and how the pool is engineered and the safety barrier built is bound by the standards and your licence. All of it stays yours, start to finish.

What's inside

01 CHAPTER ONE

The New Playing Field

Someone whose kids are growing up, or who just watched the neighbour's pool go in, can't tell a solid builder from a fly-by-night. They judge you on what they can reach — and that's where most pool outfits quietly lose the best work of the year.

Nobody rings in a panic — this is the opposite of an emergency trade. They've been dreaming about it for a year, they'll get three or more quotes, and the thing they're most afraid of is a builder taking their deposit and going broke before the pool's finished, leaving a hole in the yard. They ring around, but they decide over months. The job goes to whoever gets three things right first:

1. **Did you respond first — and book the site visit?** The first proper response wins the assessment and sets the number every later quote gets judged against. Slow to reply and you're the third quote nobody trusts.
2. **Did you sound honest, not pushy?** Whoever gives the straight answer — “I can't price this properly until I've seen your block, because rock or a high water table changes everything” — and happily invites them to compare owns the trust. A “sign today” pitch reads as a warning sign here, not a bargain.
3. **Was dealing with you safe — and will you still be here at handover?** A real local address, a licence and insurance they can check, milestone payments instead of a fat deposit, finished pools they can go and stand beside. In a trade where operators take the money and fold mid-build, safe-and-built-to-last wins the job.

Notice what none of those are about? How neatly you run the crew. All three are about being reachable, sounding honest and running the admin — the exact stuff you hate at the end of a day on site. And here's the bit nobody's telling you: the other side already runs on AI. The question isn't whether AI comes into pool building — it's whether it's working for you or against you.

The good news? This is the first time the technology favours the small operator. The big firms rolling up the trade run committees, rollouts and training programs. You can decide on a Tuesday and be responding first by Friday. The playing field just flipped: the small, honest builder can now look and perform like the national brand — without the national brand's overheads, and without the buyer wondering if you'll be around at handover.

“But I'm not a computer person”

Neither are the trades doing this best. One of the fastest adopters we've seen is a trade-business owner 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 able to say what you want is the new requirement — and builders, who walk a cautious buyer through their options every day, are already good at that.

$200–800
+ per month

What design, estimating and job-management software commonly charges in AUD — and it still makes you do the typing and the chasing. One owner was paying a grand a month for tools his team barely used. 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 enquiry. Someone works up the design and types the quote. Someone chases the deposit and the progress claim. 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:

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 foreman: say the outcome, let it work out the steps. One owner reorders stock by sending one message from the supplier counter — "grabbing the pump and the filter for the Nguyen job" — and the order, the expense and the books sort themselves.

Shift two — AI first, you second

The AI does the first pass of everything, and you approve, tweak or overrule. The quote is drafted before you sit down. One customer described it: **"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.

Shift three — corrections are investments

With normal software, you fix the same mistake forever. With AI, you fix it once. Tell it a standard quote names the exclusions and the variable items, that a sloping block should always flag retaining, and that you never promise a firm price before you've seen the site — it answers, **“I'll remember that from now on.”** 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
Enquiry lands while you're on site	Voicemail. Lost to whoever replied first.	Answered and qualified, site assessment booked — an honest fixed-price-plus-variables drafted by morning.
Wrong gear turns up from the supplier	You notice on site, chase the counter, lose the day.	Flagged against the job, re-ordered automatically — you hear only if it slips again.
Supplier's price-list update lands	Buried under 200 emails. Old rates on your next quote.	Extracted, applied to your rates — “pumps and coping up on six lines.”
Job hits handover	Servicing never offered. Progress claim “tonight”.	Progress claim sent from site. Servicing, heating and landscaping offered while they're happy.

Every chapter from here is just this exercise applied to one part of your business.

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.

The highest-value work in pool building doesn't arrive as an emergency. It arrives as a considered enquiry from someone who's going to collect three quotes over the next few months — and it's perishable in a way that has nothing to do with panic. Whoever responds first books the site visit and sets the number every later quote is measured against. Whoever's slow becomes the forgotten third quote. The enquiry buzzes in the ute at 4pm while you're pouring a shell. It rings out. That buyer rings the next mob on the list, and now they book the assessment instead of you. Gone.

First in
books the site visit

On a considered, high-ticket buy the first proper response wins the assessment and sets the number every later quote gets judged against. A missed enquiry isn't a deferred sale — it's the site visit, and usually the job, handed to a competitor. And slow response drags your search ranking down, so it costs you the next one too.

The buyer who's ready to spend $50k doesn't leave a voicemail. They ring the next mob. Voicemail is where the best jobs of the year go to die. The AI-first fix is bigger — because an enquiry is really two problems.

Problem one — the enquiry you couldn't take

An AI receptionist answers in your business's name, 24/7, sounds calm and normal on the phone, and captures every detail — where the block is, rough access, concrete or fibreglass, whether they've had quotes already — while you're on site or asleep. And it does the thing that wins the deal: it responds first, every time, so you're the builder who books the assessment while the others are still on voicemail.

Problem two — the follow-up nobody made

A pool deal isn't won on the first call — it's won in the months that follow, while the buyer collects their other two or three quotes and agonises over who won't go broke. Most builders respond once and go quiet. The one who keeps in honest contact — answering “why isn't yours the cheapest?” and “how much deposit do you want up front?” and “will you still be here at handover?” — is the one still standing when they sign.

- ✓ Every enquiry answered in your business's name — including 6pm, including Sunday, including the spring rush when every pool phone in town is ringing at once.
- ✓ A searchable record of every call — “what did we agree about the fibreglass option and the deposit?”
- ✓ Follow-ups that fire across the whole comparison window — week 1, week 4, week 8 — so you're the quote they remember, not the one that went quiet.
- ✓ Job details from the enquiry — block, access, pool type, who owns the property — flow straight into the job, not re-typed three times.

The phone stops being the thing that costs you the best jobs and becomes the thing that books the assessment — and keeps you in the room through the months they decide.

04 CHAPTER FOUR

Quote Before You Leave the Driveway

Pool building has a quoting trap most trades don't: the honest answer to "how much for a pool?" down the phone is often "I can't say properly until I've seen your block" — and out of your mouth that can sound like a dodge.

No firm price

down the phone

You haven't seen the soil, whether there's rock, the water table, how the land falls, or whether an excavator can even get into the backyard. A flat easy block, a sloping one that needs retaining, a dig that hits rock, a job the shell has to be craned over the house — wildly different work and cost, and none of it knowable from a satellite photo. A firm phone price is a guess. It's also the exact move the risky operators make: lowball to win the job, then hit them with variations at the dig that carry a $40k quote to $70k — the horror story every buyer has already heard.

So the honest operator quotes the *structure* confidently and defers the *number* honestly: a real site assessment, then a fixed price naming the pool, the finish, the exclusions and exactly what can vary — rock or water on the dig, retaining if the block needs it, difficult access. A fixed all-in price quoted sight-unseen isn't confidence — it's the amateur tell, and buyers have learned to read it as the setup for a blow-out.

AI-first quoting makes that easy: the AI *qualifies* the job before a crew rolls. Here's what that looks like in a real pool business today.

- ✓ **It asks the right questions first.** From the enquiry, the AI works through what actually sets the price — where the block is, likely access, concrete or fibreglass, rough size, whether they want heating — so you book a real assessment, not a maybe.
- ✓ **It prices from YOUR structure.** Feed it your past jobs and it learns your pool pricing, your site loadings and your variation rates — and gives an honest fixed price with the variable items named, not a number that blows out.
- ✓ **It catches what you forgot.** It doesn't get tired and leave off the safety barrier, the retaining on a sloping block, or the fact that tight access changes the whole method.

$40k → $70k

the blow-out you avoid

Here's why the assessment matters, not the phone guess: the “cheap” quote that stays silent on rock, water and access isn't cheap — it's the setup for change orders that carry a $40k pool to $70k at the dig, torch trust, and kill the review. The honest fixed price names what can vary and why, up front, so there's no ambush. That honesty about surprises beats a “no surprises” promise the ground can break.

The written on-site scope isn't red tape — it's the sell

Because the honest number depends on what you find at the property, the move is to book the assessment now and put the fixed price — with its named variables — in writing after it, before anyone signs. Framed right, that's not a delay — it's the thing that tells a cautious buyer you're not the operator who lowballs on the phone and ambushes at the dig. “We give you a written fixed price after we've actually seen your block, and we tell you up front what could change it” turns your honesty into the reason they picked you.

Then the bit everyone skips — the follow-up. One message, a week later: “Just checking you got the quote and the site notes.” That single message wins more jobs than dropping your price ever will. 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: qualify before you roll, never quote a firm price you haven't assessed, put it in writing after a real look with the variables named, follow up through the whole comparison window. A builder with a notepad who hits that standard beats one with an app who doesn't. The AI just makes the standard effortless.

05 CHAPTER FIVE

Get Paid Without the Awkward Chase

You've won the job. Now you've got to get the money — and in pool building that's never one invoice at the end. There's a deposit, a run of progress claims across a months-long build, sometimes finance, and a nervous customer watching every payment.

A modest deposit

then payments on milestones

Here's the single most reassuring thing you can do for a buyer terrified of a builder folding mid-build: don't ask for a big deposit up front. A modest deposit to secure the slot, then payments that track real, visible milestones — excavation done, shell in, tiling done, handover — so their money follows work they can see. Over-asking up front is the exact tell they're screening for: a builder wanting most of the money before the dig may be funding the last job with it. Milestone payments aren't just fair — they're your strongest trust signal.

The chasing is a system problem, not a people problem. Fix the system and you never have the awkward conversation again.

1. **Take the modest deposit the moment they sign.** A card tap or a "pay now" link when they agree beats "here are our bank details" — and it locks the job in against the other two quotes, without asking for a scary sum.
2. **Bill each progress claim automatically.** Deposit on signing, then a claim on excavation, on the shell, on tiling, on handover — billed on the agreed milestones, so nobody has to remember.
3. **Offer honest finance, no hidden markup.** If they finance, the rate and terms are on the table — never a lender's referral fee quietly rolled into the price.
4. **Escalate the tone only if you have to.** Most pay on nudge one or two. You stay the good guy the whole way.

Money is money: this is the one place you keep the AI on a short leash at the start. It drafts, you approve — until you've watched it be right for a month.

06 CHAPTER SIX

The Inbox That Runs Itself

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

Supplier statements, equipment data sheets, the council approving a permit, a customer asking about their handover date, warranty forms, price-list updates, a fencer confirming a barrier install — all mixed in with junk, all landing while you're on site with a hose in one hand and a screed in the other. One trade owner 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.”

AI-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 the council approving your permit.”
- ✓ **Drafted.** Routine replies — “yes, we build fibreglass and concrete”, “we're booked into next month” — written and waiting. You glance, tweak, send.
- ✓ **Answered on demand.** “What did we quote the Rossi job for the concrete pool and the heating?” — and it finds it instantly.

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.

07 CHAPTER SEVEN

Your Digital Office Manager

Every pool business has an office manager. Usually it's you, doing it badly at 10pm.

One week
no office admin

One trade business'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." It ended up being one of their strongest weeks — not survive the week, one of their best — because the follow-ups and the chasing didn't stop when she did.

The morning brief

Before you turn the key: today's jobs in order, which build is waiting on gear from the supplier, which enquiry should get a follow-up today, who to chase for a progress claim, and the one permit or compliance item that'll bite you if you forget it. Two minutes with a coffee — and your foreman knows too.

Job files that build themselves

Every photo, design, quote, assessment note and email attaches itself to the right job — so when the customer rings in eight months about heating or a service, the whole history's there. The enquiry, the assessment, the rock you noted, the milestone schedule, the warranty terms — all in one place.

The paperwork without the dread

The site assessment record, the milestone schedule, the safety-barrier and compliance sign-off, the handover pack — prompted, captured against the job, and kept where you can find it. Never invented for you, and never a substitute for your own assessment or your licence — just stopped from going missing.

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” — and “looking like you'll still be here at handover” — is presentation, and presentation is now nearly free.

A small builder and a fifty-person outfit can send the identical, spotless, branded quote and design — and show the same real address, the same checkable licence and insurance, the same milestone payment schedule, and the same real reviews. In a trade where the buyer's biggest fear is you taking the deposit and folding mid-build, the small operator who looks safe and built-to-last gets trusted like the big one, and can charge like it.

The referral flywheel — on purpose, not by accident

1. **Retain** — make the whole build easy, honest and clear, and keep an eye on their pool, so you're the one they call for a service or a heater, not a stranger.
2. **Review** — ask for the Google review the moment they're happiest, the first summer they're swimming, automatically, with the link. Reviews and fast response lift your ranking — and a cautious, folding-scared buyer leans hard on them.
3. **Refer** — a pool is a billboard and the summer barbecue is a showroom. The pool you built for one house gets you the neighbour who watched it go in; pools cluster, one street at a time.
4. **Resell** — this is the whole game. A pool is a 20-year relationship: servicing and chemicals for life, then the pump, filter and sanitiser wear out and get replaced, then the heating to stretch the season, then the decking and landscaping. It's all in the job file. A reminder at the right time turns one build into a decade of work.

START TODAY — EVEN WITH ZERO TECH

Ask every happy customer for a review the first summer they're swimming, and always ask the one question that opens the ladder — “want me to keep an eye on it, and sort your servicing and heating when the time suits?” A customer who just got the honest result you promised is the most receptive you'll ever find them.

09 CHAPTER NINE

The 30-Day Switch

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

1. **Week 1 — Stop the biggest leak: response time.** Every enquiry answered and qualified, the site assessment booked, follow-ups firing across the comparison window. This starts paying for the whole exercise immediately.
2. **Week 2 — Fix quoting.** The AI qualifies the job and gives an honest fixed price with the variables named from your structure; you correct it — and every correction is a lesson it keeps. Written quotes after a real assessment, with the follow-up every time.
3. **Week 3 — Fix getting paid.** A modest deposit on signing, progress claims on milestones, honest finance, automatic reminders — with you approving everything money-related until it's earned the leash.
4. **Week 4 — Hand over the back office.** Inbox triaged and drafted, morning brief running, job files and compliance building themselves, reviews asked automatically, servicing and heating re-sells flagged.

Why all four? Because one process never feels like much. Three is where the "holy hell" moment happens — because that's when the pieces start talking to each other. The enquiry becomes the assessment. The assessment becomes the job. The job becomes the milestone claims, the review and the decade of servicing.

The trust dial — how to hand over without losing sleep

You don't hand a new apprentice the ute and a job on day one. Same here:

1. **Weeks 1–2: it asks about everything.** Every email draft, every quote — “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, new customers, and anything with weight — quotes, prices, timelines, warranties — still get your nod.
3. **Month two onward: it asks about exceptions.** 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 builders 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 every job into the same old software and asking AI to “help”, you've missed the point. Re-draw the process (Chapter 2).
- ✓ **Reaching for fake urgency.** The risky operators use “sign today”. You've got a real lever — your build queue against the season, because the good builders are booked months out and a pool takes months to build — so use that honest one, and let it do the pushing.
- ✓ **Promising to win the deal.** The moment you promise a completion date the weather can't hold, or a firm price before a site look, or “no surprises” the ground can break, you sound like every operator they've been warned about. Your honest fixed price with the variables named, and a timeline with the caveats shown, is what wins the cautious buyer — the refusal to overclaim IS the pitch.

✓ BEFORE YOU PUT THIS DOWN

The 2-Minute Leak Audit

Most pool builders aren't short of skill — they're losing quotes they're already on. A typical small builder does only around 30 pools a year, but each one is worth tens of thousands, and every one is a contest against two or three other quotes. That's the tell: the money isn't in chasing more leads — it's in winning a bigger share of the quotes you already give. Lift your close rate from roughly one in six of your quotes to one in four and you don't just earn a bit more — you roughly double your build volume on the same leads, because the cost of getting each quote is already spent. Be honest — tick the ones that are true right now.

- ✓ I'm often slow to respond to enquiries — and I don't know how many jobs the delay has cost me.
- ✓ An enquiry has gone to voicemail and I never knew the phone rang.
- ✓ I've given a firm price down the phone before seeing the block — or lost a job because I wouldn't.
- ✓ I don't always follow up across the months a buyer is comparing quotes.
- ✓ I quote “all in” without spelling out what can vary if I hit rock, water or bad access.
- ✓ I ask for a big deposit up front instead of tying payments to milestones.
- ✓ I win a build, finish it, then never go back to offer servicing, heating or landscaping.
- ✓ I've promised a completion date the weather or council later blew apart.
- ✓ My inbox stresses me out, and important stuff gets buried.
- ✓ If a past customer rang about their pool, it'd take me a while to find the details.

0–2

Tight ship. A few tweaks and you're winning more of your shortlist.

3–6

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

7+

Mate, you're doing the hard work and handing the deal to whoever looks safer and follows up. Good news: it's exactly the stuff that's now easiest to fix.

The biggest lever isn't more leads — it's winning a bigger share of the quotes you're already on, and turning each build into servicing, equipment, heating and years of work. Your biggest tick is your biggest opportunity. Start there.

ONE LAST THING

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 the moment an enquiry lands, qualifies it and books the site assessment, drafts an honest fixed price with the variables named, takes a modest deposit and bills the milestone claims, keeps the compliance and handover records, follows up through the months they're comparing, and turns each build into servicing, equipment, heating and years of work — all in one, working in your pool business this week — that's what we build. It's called The Everything.

- ✓ 14-day free trial. Cancel anytime. No fixed contracts, no catch.
- ✓ 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 promise a customer a completion date, guarantee there'll be no surprises when you dig, or decide how the pool gets built — that's still you, your assessment and your licence. What it fixes is the office job you've been doing for free after dark.