

THE EVERYTHING · FIELD GUIDES FOR TRADE BUSINESSES

The AI Shopfitting Playbook

How to run a fit-out business in the age of AI

— and become the shopfitter business owners open on time with.

THE COMPLETE SYSTEM · NO FLUFF · FREE TO SHARE

THE EVERYTHING

Read this first

Ten years ago, running a proper shopfitting business meant someone on the phone, a bookkeeper, and still working out the scope, the trades and the program on a scrap of paper in the ute between sites.

Today, a good shopfitter with the right setup answers every business owner's enquiry the moment it lands, scopes it straight, gives a timeline they can plan their launch around, and opens them on time — while a bigger outfit across town is still returning voicemails. And he spends zero nights on paperwork.

He's not smarter than you. He's not a better fitter. And he's definitely not a computer person — one of the best we've seen was still drawing counters on the back of a delivery docket two years ago. He just worked out one thing before everyone else: **the boring half of the business** — the enquiries, the follow-ups, the scoped quotes, the program updates, the trade coordination, the progress claims — can now do itself. So he put his energy where the money and the reputation are: on delivering the fit-out on time, and on becoming the shopfitter a business owner opens every location with.

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 shopfitters give up before it clicks. Read it start to finish and you'll run a tighter, more profitable fit-out 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 decides how a fit-out gets built, sets the program, or replaces your judgement on scope, trades and timeline — and it never replaces your eye, your craft, or the standards the work is built to. It carries the admin. What a space really needs, what the realistic timeline is, and how the trades and approvals get sequenced is a call you make, never a number a computer invents; how the joinery and the finish get delivered to the client's brand is your trade; and being straight with an owner about the timeline — and refusing to promise a date you can't hit — stays with you. All of it stays yours, start to finish.

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CHAPTER ONE

The New Playing Field

A business owner ringing round for a fit-out can't see your past shops — they're scattered across town behind other people's brands. They judge you on what they can reach — and that's where most shopfitters quietly lose the best clients of the year.

Your customer is a business owner who has signed a lease and is paying rent on an empty space — and the one thing they're really afraid of is missing their opening and bleeding rent with no income. The job goes to whoever gets three things right first:

- 1 Did you answer — and give a straight steer?** The first shopfitter to pick up and sound like a safe pair of hands wins the site look. Let it ring out while you're on site and they ring the next one — and open every location with whoever answered.
- 2 Will you open me on time?** The owner's real fear is a blown timeline — rent running on a half-built shop. A fitter who gives a realistic timeline and holds it beats a cheaper one who promises a date he can't hit, every time.
- 3 Will it be my brand?** The fit-out is their storefront — the space every customer will judge them in. On-brand, well-finished, coordinated beats cheap and rough every time.

Notice what none of those are about? Being the cheapest price. All three are about being reachable, straight and on-time — the exact stuff that's easy to drop when you're running three sites. And the other side already runs on AI. The question isn't whether AI comes into shopfitting — 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 fit-out firms run committees, rollouts and training programs. You can decide on a Tuesday and be answering first by Friday. The playing field just flipped: the small, sharp shopfitter can now look and perform like the national outfit — without the overheads, and without a business owner ever getting a voicemail when they need a fit-out scoped before their lease clock eats them alive.

“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 shopfitters, who talk an owner through scope, timeline and trades every day, are already good at that.

**\$200–
800**
+ per month

What 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.

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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 owner's enquiry. Someone works out the scope, the trades and the program. Someone tracks the approvals, the progress claims, the trade coordination. 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 site manager: say the outcome, let it work out the steps. One owner reorders material by sending one message from the supplier counter — “grabbing the joinery board and hardware for the Nguyen café fit-out” — 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 scoped quote and the program are 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 always names the design, the approvals, the strip-out, the services, the joinery and the coordinated trades — and that you never give a firm figure or an opening date before you've scoped the space — and 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
Owner rings while you're running a fit-out	Voicemail. They ring the next shopfitter.	Answered and qualified, the site look booked — a straight scoped figure and realistic timeline by morning.
A trade or approval slips and threatens the opening	You find out late, the opening's at risk.	Flagged the moment it moves, the owner told what it means for the date before it bites.
Supplier price-list update lands	Buried under 200 emails. Old rates on your next quote.	Extracted, applied to your rates — “board and hardware up, quotes adjusted.”
A fit-out's finished	Photos on the phone, handover ad hoc.	Handover pack sent, the review asked, the next location chased from the owner.

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

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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 fit-out lead is high-value and perishable: a business owner scoping a fit-out is on a lease clock, rings a couple of shopfitters, and books whoever answers first and sounds like they'll hit the date — the slow one never hears back. The enquiry buzzes at 4pm while you're on site coordinating a strip-out. It rings out. That owner rings the next shopfitter, books the site look, and now they're the one opening the shop — and the next one, and the rollout. Gone — and not just this fit-out, maybe every location that owner ever opens.

First in

wins the owner

A business owner on a lease clock rings whoever picks up and sounds like they'll open them on time. A missed enquiry isn't a deferred sale — it's the fit-out, and often every future location behind it, handed to whoever answered. And slow response drags your search ranking down, so it costs you the next one too.

Voicemail is where the best clients of the year go to die. The AI-first fix is bigger — because an enquiry is really two problems.

Problem one — the call you couldn't take

An AI receptionist answers in your business's name, 24/7, sounds calm and professional on the phone, and captures every detail — the type of space, the rough size, the design stage, the target opening date, whether there's a strip-out — while you're on site or asleep. And it does the thing that wins the job: it answers first, every time, so you're the shopfitter who books the site look while the others are still on voicemail.

Problem two — the owner nobody kept

A shopfitting business isn't won on one fit-out — it's won on becoming the shopfitter a business owner opens every location with. Most fitters do a job and never think past it. The one who answers first, opens them on time, and delivers their brand is the one that owner calls for their next site, their rollout, and recommends to every other owner who walks into the finished space.

- ✓ Every enquiry answered in your business's name — including 6pm, including the weekend, including the week every owner in town is racing a lease clock.
- ✓ A searchable record of every project — “what did we scope and quote the Rossi café at, and what was the program?”
- ✓ Follow-ups that keep you in front of the owners who matter — so when their next location comes up, you're the one they ring.
- ✓ Project details from the enquiry — the space, the design stage, the opening date — flow straight into the site look, not re-typed three times.

The phone stops being the thing that costs you the best owners and becomes the thing that books the site look — and keeps you the shopfitter they open every location with.

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CHAPTER FOUR

Quote It Straight — Scope, Timeline and All

Shopfitting has a quoting shape most trades don't: the number is only half of it — the other half is the timeline, because the client is buying an opening date as much as a fit-out. And neither can be judged down a phone line.

The scope and the timeline

and the promised date is the tell

A fit-out is a scope AND a program, not a price: the design/documentation, the approvals, the strip-out, the services (power/plumbing/data/HVAC), the joinery and finishes, the trades sequenced to the program, and the handover ready to open. The cowboy quotes a low number and an opening date he can't hit to win the job, then blows the timeline and the budget mid-project and the owner bleeds rent. Scope it properly, give a realistic timeline the owner can plan their launch around, and price it straight — and you're the shopfitter an owner opens every location with.

Here's the honest truth of this trade: **a firm price and a promised opening date down the phone, sight-unseen, are the red flags — not the reassurance.** Nobody can price or program a fit-out properly without seeing the space, the scope and the design. The honest move is to give a rough steer, then look at the space and scope it — the condition, the services, the approvals, the trades — before you commit a firm figure and a date.

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

- ✓ **It asks the right questions first.** From the enquiry, the AI works through what actually sets the price and the program — the type and size of space, the design stage, the services, the approvals, the target opening — so you book the site look with the right information in hand.
- ✓ **It prices from YOUR structure.** Feed it your past fit-outs and it learns your rates and your trade costs — and drafts a straight, scoped figure with the design, approvals, services and coordinated trades named, not a flat number that hides them.
- ✓ **It builds a realistic program.** It doesn't forget the approval lead times, the services coordination, or the trades that have to be sequenced — so the timeline you give is one you can actually hold.

The opening date

the promise you don't fake

Here's the trust-killer of this trade: the owner has a lease, a launch, staff and stock all pinned to an opening date — and the cowboy promises that date to win the job knowing he can't hit it, then the opening slips and the owner bleeds rent on a half-built shop with no income. The honest shopfitter gives a realistic timeline built from the real scope, the approvals and the trades to coordinate, and holds it — and says plainly when a date isn't achievable. Refusing to promise a date you can't hit isn't losing the job. It's the whole reason an owner should pick you.

The site look on a fit-out isn't friction — it's the sell

For any fit-out, the move is to give a rough steer, book the site look and scope it before you commit the number and the date. Framed right, that's not a delay — it tells an owner you won't win their job on a fantasy timeline and then cost them their opening. “I'll give you a ballpark now, and a firm price and a realistic timeline once I've scoped it, so the date I give you is one you can actually open on” turns your honesty into the reason they picked you.

Then the bit everyone skips — staying in front of the owner. One message after a fit-out: “You're open and trading — handover pack's with you. When's the next location?” That single habit wins more rollouts than dropping your rate ever will. At first, that follow-up isn't a thing you remember. It's a thing that just happens.

THE POINT ISN'T THE SOFTWARE

It's the standard: scope it properly, give a timeline you can hold, coordinate the trades so the opening holds, and deliver their brand. A shopfitter with a notepad who hits that standard beats one with an app who doesn't. The AI just makes the standard effortless.

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CHAPTER FIVE

Get Paid Without the Awkward Chase

You've won the fit-out. Now you've got to get the money — and shopfitting is a staged project: a deposit to start, progress claims as it moves, the trades and materials to fund along the way, and the odd variation when the space throws up a surprise.

Staged claims

no surprise variation

The single most reassuring thing you can do for an owner is be straight and steady on the money: a deposit to start, progress claims as the fit-out hits its milestones — strip-out done, services in, joinery installed, handover — and any variation (a landlord condition, a services surprise) had as a *conversation before the work*, not sprung after. A surprise “extra” at handover is the exact thing that turns a rollout client into a one-off. Steady, milestone-based billing isn't just fair — it's your strongest reason to be kept for the next location.

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

- 1 **Deposit to start.** A clear deposit request when the fit-out's booked and scoped funds the material and the start — and commits the owner.
- 2 **Claim on the milestones.** Progress claims tied to visible milestones — strip-out, services, joinery, handover — so nobody's carrying the project on trust and the owner always knows where the number's at.
- 3 **Flag the variation before it bites.** If the space throws up a surprise, the owner hears what it costs and what it means for the opening *before* the work goes on. A conversation, not an ambush at handover.
- 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.

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CHAPTER SIX

The Inbox That Runs Itself

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

Supplier statements, an owner confirming a design, a landlord's conditions, a trade confirming they're booked, approval correspondence, a photo of a space to scope, a review notification, a past owner with their next location — all mixed in with junk, all landing while you're on site coordinating three trades. 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 Rossi café landlord's fit-out conditions, they affect the program.”
- ✓ **Drafted.** Routine replies — “yes, we coordinate all the trades”, “we can scope it Thursday” — written and waiting. You glance, tweak, send.
- ✓ **Answered on demand.** “What did we quote the Rossi fit-out, and what was the opening date?” — 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.

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CHAPTER SEVEN

Your Digital Office Manager

Every shopfitting 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 site looks and fit-outs in order, which project's approval or trade is due (and which one threatens an opening if it slips), which owner should get a follow-up, who to chase for a progress claim, and the one thing that'll bite the program if you forget it. Two minutes with a coffee — and your site manager knows too.

Job files that build themselves

Every photo, quote, design and program attaches itself to the right project — so when the owner rings for their next location, the whole history's there. The scope, the trades, the timeline, the finishes, the opening date — all in one place.

The paperwork without the dread

The scope, the program, the progress claims, the trade coordination, the handover pack — drafted, sent, and kept where you can find it. Never a substitute for your judgement on scope and timeline — just stopped from going missing while you're running three sites.

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CHAPTER EIGHT

Look Twice as Big as You Are

Here's a secret the big outfits rely on you not knowing: most of “looking professional” — and “looking like a shopfitter who'll open you on time” — is presentation, and presentation is now nearly free.

A small fit-out crew and a fifty-person firm can send the identical, spotless, branded scope and program — and show the same fast response, the same clear timeline, the same photos of finished fit-outs, and the same real reviews from business owners. In a trade where an owner is trusting you with their opening and their brand, the small operator who looks organised and on-top-of-it gets trusted like the big one — and kept for the rollout.

The referral flywheel — on purpose, not by accident

- 1 Retain** — answer first, open them on time, deliver their brand, so you're the shopfitter that owner opens their next location with without shopping around.
- 2 Review** — ask for the Google review the moment an owner's happiest, the day they open and start trading, automatically, with the link. Reviews and fast response lift your ranking — and an owner choosing a shopfitter leans on both.
- 3 Refer** — a fit-out is a permanent showroom: every customer and every other business owner who walks into the space sees your work and asks “who did your fit-out?”. It's one of the strongest owner-to-owner referral webs in the trades.
- 4 Resell** — this is the whole game. One good owner isn't a fit-out, it's their whole rollout: the next location, and the one after. It's all in the job file. A follow-up at the right time turns one shop into years of work.

START TODAY — EVEN WITH ZERO TECH

Ask every owner for a review the day they open and start trading, and always leave the door open — “I'd love to do your next location, and send any owner who asks about the fit-out my way.” An owner who just opened on time in a space that's exactly their brand is the most receptive you'll ever find them.

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CHAPTER NINE

The 30-Day Switch

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

- 1 **Week 1 — Stop the biggest leak: the missed call.** Every enquiry answered and qualified, a straight steer given, the site look booked. This starts paying for the whole exercise immediately.
- 2 **Week 2 — Fix quoting.** The AI qualifies the job and drafts a straight scoped figure and a realistic program from your structure; you correct it — and every correction is a lesson it keeps. Site look before any firm number or date, follow-up after every job.
- 3 **Week 3 — Fix getting paid.** Deposit to start, progress claims on the milestones, variations flagged early, 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 program/coordination records building themselves, reviews asked automatically, the next location chased.

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 call becomes the site look. The look becomes the scoped, programmed fit-out. The fit-out becomes the on-time opening, the progress claims, and the next location from the same owner.

The trust dial — how to hand over without losing sleep

You don't hand a new site manager a whole fit-out 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 owners, and anything with weight — scopes, timelines, variations — 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 shopfitters 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.** You don't need it — the client's own opening date and rent clock are the most real urgency in any trade. Use that honest one: “we'll have you open on the date you're paying rent from.”
- ✓ **Competing on price.** The moment you win by being the cheapest, you're the one who has to thin the coordination or promise a date you can't hit to make the money work — and that's the blown opening. An owner pays for a fitter who opens them on time in their brand — being trusted to hit the date wins the rollout, not the lowest price.



BEFORE YOU PUT THIS DOWN

The 2-Minute Leak Audit

Most shopfitters aren't short of skill — they're losing owners. Your money isn't in winning strangers on a cheap price; it's in becoming the shopfitter a business owner opens every location with, because one good owner is their whole rollout and their referral to every other owner who walks into the finished space. That's the tell: answer first, scope it straight, open them on time, deliver their brand. Be honest — tick the ones that are true right now.

- ✓ I'm often slow to answer enquiries — and I don't know how many owners the delay has cost me.
- ✓ An owner's enquiry has gone unanswered and they booked the next shopfitter.
- ✓ I've given a firm price or an opening date down the phone on a space I hadn't scoped — and worn the blow-out.
- ✓ I've won a fit-out on a low number and a timeline I couldn't really hit.
- ✓ I've missed a client's opening date and left them bleeding rent.
- ✓ I don't stay in front of past owners, so they open their next location with someone else.
- ✓ My scopes, programs and trade bookings live in my head and my phone, not in one place.
- ✓ A trade or approval has slipped and I found out too late to protect the opening.
- ✓ My inbox stresses me out, and important stuff — a landlord condition, a progress claim — gets buried.
- ✓ If an owner asked for their fit-out history for the next location, it'd take me a while to find it.

0–2

Tight ship. A few tweaks and you're the shopfitter on more owners' rollouts.

3–6

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

7+

Mate, you're doing the hard project work and handing the owner to whoever answered first. Good news: it's exactly the stuff that's now easiest to fix.

The biggest lever isn't a cheaper price — it's answering first, opening them on time in their brand, and turning each owner into their whole rollout and referrals to every owner who walks into the space. 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 the moment a business owner rings, qualifies the job and books the site look, drafts a straight scoped quote and a realistic program with the design, approvals, services and trades named honestly, takes the deposit and claims on the milestones and flags a variation before it bites, keeps the program and coordination records, and chases the next location from every owner you've opened on time — all in one, working in your shopfitting business this week — that's what we build. It's called

- ✓ 14-day free trial. Cancel anytime. No fixed contracts, no catch.
- ✓ Nothing important — a quote, a progress claim, an owner's 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 fit-outs at the-everything-app.com — no credit card to look.

Honest note: this won't fix a broken business, and it won't scope the space, set the timeline, or coordinate the trades on site — that's still you, your eye, and your judgement. What it fixes is the office job you've been doing for free after dark.