



⊕ ISW.consulting

✉ contact@isw.consulting

☎ 940-240-8868

AI CLARITY AUDIT™ REPORT

TRINITY ROOFING & CONSTRUCTION

Content Sections:

1. Executive Summary
2. AI Opportunity
3. Tool Recommendations & Criteria
4. Recommended Roadmap & ROI
5. Risks, Constraints & Dependencies

1. Executive Summary

Trinity Roofing & Construction is a 15-year storm restoration contractor running two locations with a lean, high-trust team. Execution is not the problem. Subs get paid every Friday and always show up, supplements are handled by a 37-year insurance veteran, and the custom Zoho build moves every job through the pipeline stage by stage.

The problem is demand. In Paul's words, it is a Ferrari with a 50 mph governor. Company-generated leads run two to three a month, marketing spend has produced almost no traceable return, and the reps carry the burden of creating their own work.

This audit puts AI exactly where the governor is, and it does it for the season Trinity is actually in. There is no storm carrying the business right now, so the seven opportunities sit in three buckets: **marketing** that makes Trinity visible to homeowners searching today, **communications** that answer faster and close more of the window and retail work already in reach, and **operations** that make the customer experience and the numbers behind it repeatable. Two areas are deliberately left alone: the supplementing process and the reps' handwritten notes. Those are relationships and craft, and they are part of why Trinity wins.

Value At A Glance

New customer visibility Both profiles and the website working for window, repair, and gutter searches instead of sitting idle.	Marketing truth Every call, form, and job tied to a source, so the next dollar is spent on evidence.	Faster first response Every inquiry answered in minutes with a drafted reply the rep approves and sends.
Window close rate A consistent proposal and follow-up sequence through the week-long window decision.	Warm demand Fifteen years of customers worked properly for windows, gutters, and referrals.	A calmer job One reviewed dispatch packet per job, and homeowners updated before they have to ask.

1. Executive Summary

Expected Outcomes

Outcome area	Planning estimate
Local visibility and content production	6-10 hours per month of content work, replacing spend that produced one tracked lead
Attribution and channel reporting	3-5 hours per month, plus untracked spend identified in the first cycle
Review and referral engine	3-5 hours per month, and review volume that finally tracks completed jobs
Lead response and sales follow-up	6-10 hours per month across the sales team, plus hours off the response clock
Past-customer and window campaigns	6-12 hours per month across the team, against a list touched almost never today
Job coordination and customer updates	5-10 hours per month for Jan now, and materially more as window work stacks up
Pipeline capture and reporting	2-4 hours per rep per month, plus the first reliable close-rate baseline

Ranges are planning estimates built from the volumes and roles described in the discovery call, not measured results. Phase 1 of the roadmap captures the baseline that turns these into real numbers.

The one-sentence version

Trinity does not have an execution problem, it has a visibility and follow-through problem, so AI goes to marketing and customer communication first, operations second, and never near the supplementing process that protects the margin.

2. AI Opportunity

1	Local visibility and search presence	HIGHEST PRIORITY MARKETING
GOAL Get Trinity found by homeowners searching right now, on Google and inside AI assistants, without paying another vendor for rankings that never converted.	WHAT AI DOES Audits both Google Business Profiles against local competitors. Drafts city and service pages for windows, repairs, gutters, and roofing across the towns Trinity actually serves. Writes profile posts from real job photos, and builds the question-and-answer content that AI assistants pull from when someone asks who replaces windows in a given city.	
AUTOMATION FLOW Profile and site audit -> AI drafts content calendar and page outlines -> owners approve -> published to the site and both profiles -> inbound tracked by source.	HUMAN REVIEW POINT Paul and Lauren approve every published word, photo, and service claim. No damage or storm claim is published without a cited source. Commercial roofing comes off the site.	
TIME SAVINGS Planning range: 6-10 hours per month of content production. The comparison point is a \$3,700 per month program that produced one tracked lead.	EXPECTED OUTCOME Trinity appears for window, repair, and gutter searches in both markets, and the profiles become a lead source instead of a placeholder.	
2	Lead source attribution and spend review	HIGHEST PRIORITY MARKETING
GOAL Put a source on every lead and every job so the next marketing dollar is spent on evidence instead of a sales pitch.	WHAT AI DOES Tags every call, form, and web session to its source and carries that source through to the signed job. Compares spend by channel against leads, appointments, and revenue. Flags channels with no traceable return, and channels that need more data before a verdict.	
AUTOMATION FLOW Tracking numbers and forms -> source written to Zoho -> carried through to close -> AI channel summary -> Lauren validates spend -> keep, cut, or scale.	HUMAN REVIEW POINT Lauren confirms every financial figure against QuickBooks. Paul and Lauren make all spend decisions. AI never buys media, changes a budget, or renews a vendor.	
TIME SAVINGS Planning range: 3-5 hours per month on reporting. The larger effect is stopping untracked spend, currently the single biggest leak in the business.	EXPECTED OUTCOME Cost per lead and cost per job by channel in one view, available before the next invoice is due.	

2. AI Opportunity

3	Review and referral engine	HIGH PRIORITY MARKETING
GOAL Turn every finished job into local proof, because reviews are the cheapest asset Trinity owns that moves both ranking and close rate.	WHAT AI DOES Triggers a review request the day a job is completed, written in the voice of the rep who sold it. Drafts a response to every review for approval. Pulls recurring review themes into website and profile content, and drafts referral asks to customers who already left five stars.	
AUTOMATION FLOW Job marked complete in Zoho -> AI drafts the request from the owning rep -> rep approves -> request sends -> new review -> AI drafts response -> owner approves and posts.	HUMAN REVIEW POINT A person approves every request and every response. Anything below four stars goes to Paul or Lauren and is never auto-answered.	
TIME SAVINGS Planning range: 3-5 hours per month, against a review process that today depends entirely on someone remembering.	EXPECTED OUTCOME Review volume that tracks completed jobs, stronger local ranking, and a referral ask that actually happens.	

4	Lead response and sales follow-up system	HIGHEST PRIORITY COMMUNICATIONS
GOAL Answer every new inquiry within minutes and keep the conversation alive through the decision window, especially on windows where a homeowner takes about a week and is weighing financing.	WHAT AI DOES Drafts an immediate personalized reply to every web form, text, and message for the rep to send with one tap. Builds the window proposal packet: options compared side by side, energy-efficiency benefits, financing explained in plain language, and what happens next. Drafts every follow-up touch through the decision window.	
AUTOMATION FLOW New inquiry -> AI drafts reply and qualifying questions -> rep sends -> appointment -> AI drafts proposal packet and follow-up cadence -> rep approves each send -> outcome logged.	HUMAN REVIEW POINT The rep sends everything. Nothing auto-sends to a homeowner. No price, financing term, or coverage statement leaves without the rep confirming it, and no AI voice ever answers the phone.	
TIME SAVINGS Planning range: 6-10 hours per month across the sales team, plus hours cut from the response clock where most leads are won or lost.	EXPECTED OUTCOME Faster first response, a consistent window follow-up sequence instead of memory, and a measurable lift on the longest decision cycle Trinity has.	

2. AI Opportunity

5

Past-customer reactivation and window campaigns

HIGH PRIORITY
COMMUNICATIONS

GOAL

Work the fifteen years of customers already sitting in Zoho, and put windows, gutters, and insulation in front of the people most likely to buy them.

WHAT AI DOES

Segments the database by service, city, job date, and claim outcome. Drafts campaigns per segment: roof customers who never did windows, window customers missing gutters or insulation, repair-only customers, and claims that were never approved. Writes each sequence in the owning rep's voice with one clear ask.

AUTOMATION FLOW

Zoho segment -> AI drafts sequence -> owning rep approves -> scheduled send -> replies route straight to that rep -> source logged on every response.

HUMAN REVIEW POINT

The owning rep approves every message carrying their name. Handwritten notes stay handwritten. No claim amount, deductible, or carrier is ever referenced.

TIME SAVINGS

Planning range: 6-12 hours per month across the team, against a list that currently gets touched almost never.

EXPECTED OUTCOME

Off-season demand that does not require a storm, and window and gutter work sold into a warm list instead of a cold market.

6

Job coordination and customer status updates

HIGH PRIORITY
OPERATIONS

GOAL

Take the multi-directional text load off Jan and give the homeowner a clear picture of what happens next, which is where reviews and referrals are actually won.

WHAT AI DOES

Builds the per-job packet from the Zoho record: address, house photo, scope by trade, materials, color selections, access notes, and the homeowner time window. Drafts each sub message in the format that sub responds to and tracks confirmations. Drafts the homeowner update at every milestone so nobody has to chase Jan for a status.

AUTOMATION FLOW

Contract signed -> required-items check -> AI builds dispatch packet and homeowner update -> Jan reviews -> approved messages send -> confirmations tracked -> status written back to Zoho.

HUMAN REVIEW POINT

Jan approves every packet and every message. AI does not commit a date, a crew, or a price. Paul retains all quality-control calls.

TIME SAVINGS

Planning range: 5-10 hours per month at current volume, and materially more once window and gutter jobs stack alongside roofs.

EXPECTED OUTCOME

A two-page trade list becomes one reviewed packet, color and material holds surface before they delay a job, and homeowners stop calling to ask where things stand.

2. AI Opportunity

7	Pipeline capture and close-rate visibility	HIGH PRIORITY OPERATIONS
GOAL Close the data-entry gap so close rate, time to decision, and cost per job become real numbers by rep and by service line.	WHAT AI DOES Turns a rep's voice note or short mobile form into a draft Zoho record with contact, address, service, stage, and next step. Flags stale or incomplete records. Drafts the weekly pipeline brief for the leadership meeting.	
AUTOMATION FLOW Voice note or short mobile form -> AI drafts the record -> rep confirms in one tap -> stage tracked -> weekly brief drafted for leadership.	HUMAN REVIEW POINT The rep confirms every record before it counts. Lauren reviews the weekly brief before it is used to judge anyone's performance.	
TIME SAVINGS Planning range: 2-4 hours per rep per month in entry time, plus the first close-rate baseline Trinity has ever had.	EXPECTED OUTCOME Entering a deal becomes faster than avoiding it, and every marketing and sales change above can finally be proven or disproven.	

Where AI does not belong at Trinity

- **Answering the phone.** No AI voice picks up for a homeowner. Jan and the reps stay on the line, and every tool here works behind them rather than in front of them.
- **Supplementing.** Nancy's work is carrier-specific judgment built on 37 years inside the industry. It stays entirely with Nancy.
- **Adjuster and insurer contact.** Trinity discusses scope, it does not negotiate. No AI-drafted message goes to an adjuster, insurer, or mortgage company.
- **Insurance estimates.** The homeowner's insurance paperwork is the estimate. No AI-generated estimate or competing scope for an insurance job, ever.
- **Handwritten notes.** The reps' personal notes and the handwritten thank-you cards are a differentiator. They stay handwritten.
- **Quality control.** Paul's eye on a finished roof is not a checklist an AI can run.

3. Tool Recommendations

Tool	Category	Problem solved	Difficulty	Estimated monthly cost
Zoho CRM Enterprise + Zia	CRM & AI	Pipeline stages, required fields, segmentation for campaigns, and close-rate reporting on the system Trinity already owns.	Low-Med	\$40 per user monthly on annual billing. Ultimate \$52. CRM Plus around \$57 if Campaigns and SalesIQ are bundled.
ChatGPT Business or Claude Team	AI workspace	One managed account for content drafting, proposal packets, campaign copy, and the Trinity prompt library.	Low	\$20 to \$25 per user per month, two-seat minimum on both.
CallRail	Attribution	Ties every call and form to a source. Records and transcribes for coaching, but never answers a call.	Low	Roughly \$50 to \$195 per month on annual billing, plus per-minute and per-number usage.
Google Business Profile	Local presence	The highest-value local asset Trinity already owns, and the one the paid maps program was supposed to move.	Low	\$0.
BrightLocal	Local SEO	Rank tracking by city and service, profile audits, citation accuracy, and proof that the visibility work is working.	Low	Track around \$39, Manage \$49, Grow \$59 to \$79 per month. Annual billing lower.
NiceJob	Reviews	Automated review requests when a job completes, plus AI-drafted review responses on the Pro tier.	Low	\$75 Reviews, \$125 Pro. Month to month, no contract.
Make.com	Automation	Moves approved data and draft actions between Zoho, CallRail, SMS, QuickBooks exports, and the AI workspace.	Medium	Roughly \$12 Core, \$21 Pro, \$38 Teams per month on annual billing at 10,000 credits.
Looker Studio	Reporting	One owner view of leads, sources, pipeline, close rate, and cost per job across everything above.	Medium	\$0 for the no-cost edition.

Start with what Trinity already pays for. Zoho and the two Google Business Profiles carry more of this plan than any new purchase, and the entire recommended stack costs less per month than the maps program that produced a single tracked lead. Storm-targeting tools are worth evaluating before the next season, not now.

4. Recommended Roadmap

1	Build the measurement foundation Name the owner, put a source on every lead, and capture the baseline.
2	Fix the visibility Trinity already owns Both profiles and the website before another dollar of paid spend.
3	Turn finished jobs into proof Reviews and referrals are the cheapest visibility Trinity can buy.
4	Cut response time and arm the reps Answer in minutes, then follow up on a schedule instead of memory.
5	Work the existing database Fifteen years of customers, segmented and worked properly.
6	Tighten the job and the experience One packet per job, and a homeowner who never has to ask.
7	Scale only what pays Keep what earns its place, retire the rest, then prepare for the season.

1	Build the measurement foundation	
	- Name an internal systems owner and a backup, and confirm what Trinity can change in Zoho without calling Business 411. - Stand up call and form tracking by location and channel, and write the source into Zoho on every lead. - Define the minimum required Zoho fields for a lead, an appointment, and a signed job, agreed with the reps before anything is enforced. - Capture the baseline: leads per month by source, spend by vendor, review count by profile, and today's best estimate of close rate by service line. - Decide the paid maps renewal against tracked results rather than another month of hope.	ADVANCE WHEN Every inbound lead carries a source, the required fields are agreed, and a baseline exists to measure against.

2	Fix the visibility Trinity already owns	
	- Rebuild both Google Business Profiles: services, service areas, hours, categories, and real job photos. - Remove commercial roofing and anything else Trinity does not sell so the profile matches the business. - Publish city and service pages for windows, repairs, gutters, and roofing across the towns Trinity actually serves. - Add the question-and-answer content that both search engines and AI assistants pull from. - Track rankings by city and service so the work is provable rather than promised.	ADVANCE WHEN Both profiles are complete, accurate, and posting on schedule, and profile-driven calls are rising month over month.

4. Recommended Roadmap

3 Turn finished jobs into proof

- Connect the review request to job completion in Zoho, written in the voice of the rep who sold the job, timed for the day the work finishes.
- Assign one owner for review responses, with AI drafting and a person approving every reply.
- Route anything below four stars to Paul or Lauren before a response is written.
- Ask for referrals from the customers who already left five stars.

ADVANCE WHEN

Review volume tracks completed jobs, both profiles show recent activity, and every response is human-approved.

4 Cut response time and arm the reps

- Draft an immediate reply for every web form, text, and message so the rep can send in one tap.
- Build the window proposal packet: options compared, energy benefits, financing in plain language, and next steps.
- Build the follow-up cadence for the window decision week and for every claim stage.
- Give reps a one-tap way to capture an appointment from the field, by voice note or short mobile form.
- Sit with Joel and Alex to confirm what actually saves them time before rolling anything wider.

ADVANCE WHEN

First response is measured in minutes, window follow-up runs the same way every time, and reps use the capture tool without being chased.

5 Work the existing database

- Clean and segment the Zoho history by service, city, job date, and claim outcome.
- Run the window and energy-efficiency campaign to roof customers who never bought windows.
- Run the companion-service campaign to window customers missing gutters, paint, or insulation.
- Work the unapproved-claim list as a warm list rather than a dead one.
- Log a campaign source on every response so the return is measurable.

ADVANCE WHEN

Reactivation produces booked appointments at a measurable cost per job, and off-season demand no longer depends on a storm.

6 Tighten the job and the experience

- Standardize the dispatch packet: address, house photo, trade scope, materials, colors, access notes, homeowner window.
- Draft each sub message in the format that sub already responds to, and track confirmations in one view.
- Flag jobs held up by a missing color selection or an unconfirmed sub before they reach the schedule.
- Draft the homeowner status update at each milestone so nobody chases Jan for an answer.
- Publish the weekly pipeline brief so close rate and cycle time are visible to leadership.

ADVANCE WHEN

Jan approves packets instead of assembling them, no job reaches install day with an unconfirmed trade, and homeowners are informed before they call.

4. Recommended **Roadmap** & ROI

7 Scale only what pays

- Review cost per lead and cost per job by channel, and cut anything that does not clear the bar.
- Review automation failures, correction rates, license overlap, and what the team actually uses.
- Keep one AI workspace and one automation platform unless a measured need justifies another.
- With the always-on engine running and measured, evaluate storm-targeting tools ahead of the next season.

ADVANCE WHEN

Marketing spend is justified by tracked jobs, the workflows run without ISW in the room, and the systems owner can operate everything in place.

ROI Measurement Plan

Measure	What to capture	Target	Evidence
Local visibility	Profile views, calls and direction requests from each profile, and ranked terms by city and service.	Month-over-month growth in profile-driven calls	Profile insights + rank tracking
Company lead volume	Qualified company-generated leads per month, by source.	Three times the current two to three per month	Call tracking + Zoho source field
Speed to first response	Minutes from inquiry to a reply the homeowner actually receives.	Under 15 minutes during business hours	Message and CRM timestamps
Window close rate	Close rate and time to decision on window jobs specifically.	Baseline set, then improved each quarter	Zoho reports by service line
Review velocity	New reviews per completed job, and response time on each.	40% or more of completed jobs	Review platform + profiles
Reactivation return	Appointments and revenue produced by each past-customer campaign.	Measurable cost per job per campaign	Campaign source in Zoho
Pipeline capture	Share of appointments with a Zoho record created the same day.	95%	Zoho field completeness report
Cost per acquired job	Spend divided by closed jobs, per channel.	Every active channel measured	Attribution dashboard
Control compliance	Customer or sub-facing messages sent without human approval.	Zero	Approval and automation log

Read this before the first report

The first honest close rate will look worse than the current 60% to 80% estimate, because today only the deals that are already real get entered. That drop is the measurement working, not the sales team slipping. Judge the reps on the trend after the baseline is set, not on the first month against a number that was never complete.

5. Risks, Constraints & Dependencies

Item	What it means	How the plan handles it
Insurance and licensing limits	Trinity can discuss scope but cannot negotiate, and cannot write a competing estimate for an insurance job.	No AI-drafted adjuster or insurer correspondence, and no AI-generated insurance estimate. Claim documents stay with Nancy and the owners.
Supplementing stays human	The process that protects the margin runs on carrier-specific judgment and relationships.	Explicitly out of scope. Nothing in this roadmap touches or reshapes that workflow.
No AI in front of the customer	Trinity sells on trust, and a homeowner reaching a machine damages it.	Every tool here drafts for a person to send. No AI answers the phone and nothing auto-sends to a homeowner.
Data-entry discipline	Close rate and cost per job cannot be measured until reps enter their deals.	Capture is made faster than avoidance, agreed with the reps first. Enforcement follows adoption, not the other way around.
Content accuracy	Published local content can overpromise on coverage or damage without anyone noticing.	Owners approve every published word. No coverage claims, no storm claims without a cited source, and no services Trinity does not sell.
Zoho customization	The instance was custom built by an outside firm.	Confirm what Trinity can self-modify before scoping anything that needs structural changes to the build.
Subs are text-first	Most subs are low-tech, and one key trade communicates poorly.	Dispatch runs over SMS in each sub's existing format. No sub is asked to adopt an app or a portal.
Key-person concentration	Jan, Nancy, and Amelio each hold a critical piece of the business.	Automation documents and backs up these roles so a sick day is survivable. It does not replace them.
Seasonality	A quiet season is the right time to build this and the wrong time to judge it on volume alone.	Measure per-unit savings and per-campaign return now, and review channel ROI across a full season before scaling spend.
Human review is mandatory	Every output here is a draft until a person approves it.	No autonomous sends to homeowners, adjusters, insurers, or subs. No autonomous spend, ever.

A quick note on the nature of AI

The tools, platforms, and capabilities available today may look very different six months from now. That is the nature of one of the fastest-moving industries in history. Every AI Clarity Audit™ is built around the best available information at the time of delivery, and all tool recommendations, pricing references, and platform capabilities are based on available data as of your report date.

ISW Consulting is not responsible for changes that occur after delivery, including shifts in tool pricing, availability, or functionality. We recommend revisiting your audit periodically and encourage you to reach out with questions about how the evolving AI landscape may impact your recommendations.