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COMPANION GUIDE AI PROMPTS & SETUP

TRINITY ROOFING & CONSTRUCTION

Ready-to-use workflows, prompts, and plain-language activation steps.

Content Sections:

1. Workflow Diagrams
2. Prompt Library
3. Implementation Guides

GUIDE AT A GLANCE

A practical operating companion

Use this guide to run the approved workflows and train the team. The separate AI Clarity Audit™ Report explains what to prioritize, the expected value, the recommended tools, and the order of implementation.

Section		What is inside
01	Workflow Diagrams	Seven vertical maps showing where AI works, where a person takes over, and how information moves between the website, Zoho, the field, and the customer.
02	Prompt Library	Ten prompts written for Trinity's marketing, customer communication, window sales, and production workflows.
03	Implementation Guides	Eight plain-language setup guides with a simple activation ladder for each recommended tool.

Non-negotiables at Trinity

- No AI voice answers the phone and nothing auto-sends to a homeowner. Every message is drafted for a person to approve and send.
- No AI-generated estimate for an insurance job. The homeowner's insurance paperwork is the estimate.
- No AI-drafted message to an adjuster, an insurer, or a mortgage company. Ever.
- Nothing about supplement scope, carrier rules, or coverage positions goes into an AI tool.
- Nothing gets published to the website or a profile without an owner approving the exact wording.
- Paste the minimum data needed. No policy numbers, no claim documents, no full customer exports.

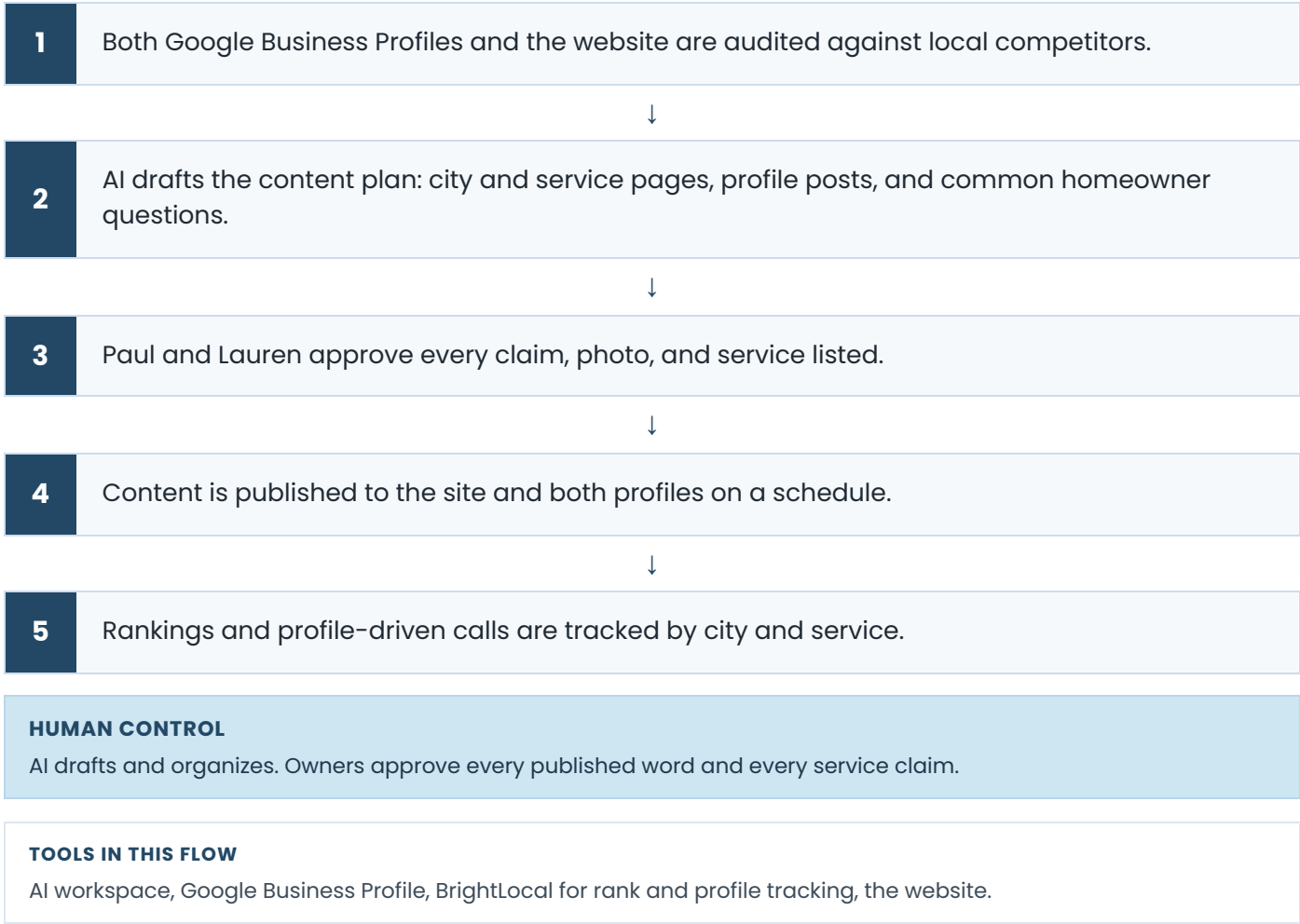
Before every prompt

These prompts are written to produce review-ready drafts, not finished work. They deliberately require source references, explicit unknowns, and a human confirmation step. Read the output against the source before it enters Zoho, reaches a customer, or gets published anywhere.

01 WORKFLOW DIAGRAM 1

Local Visibility and Search Presence

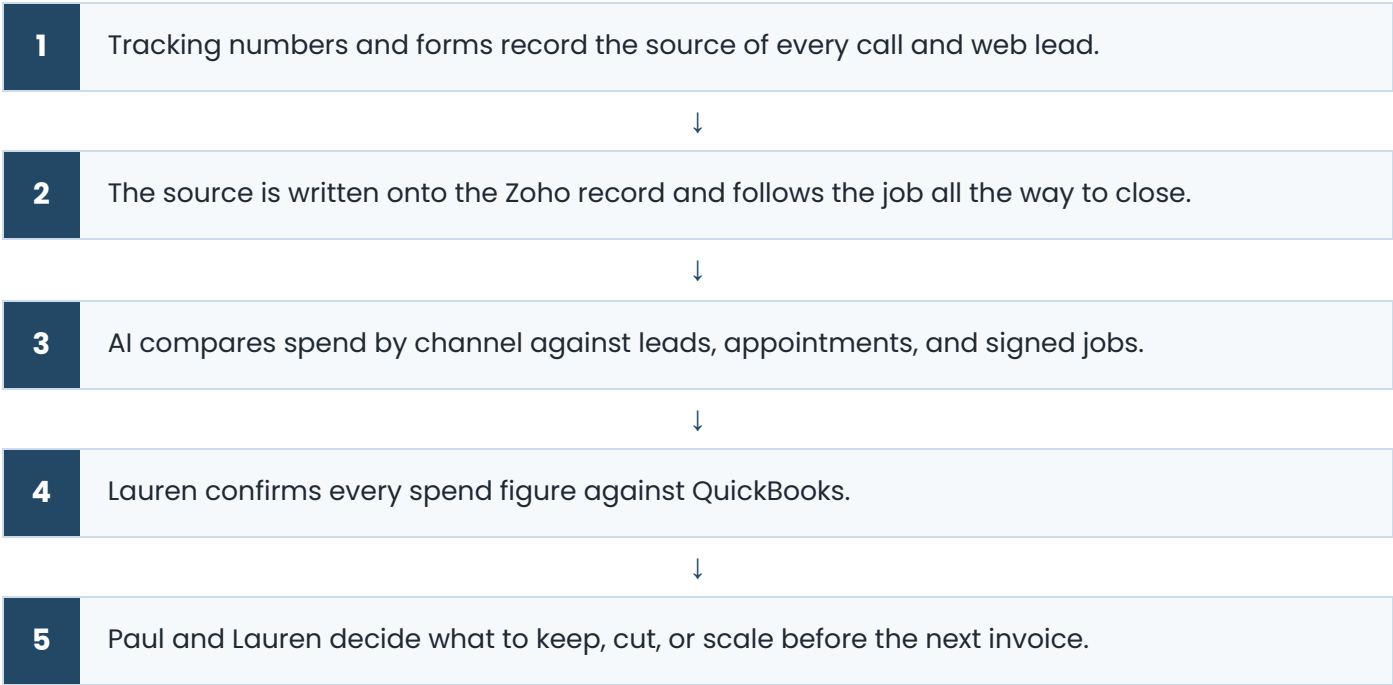
From an idle profile to a page a searching homeowner actually finds.



01 WORKFLOW DIAGRAM 2

Lead Attribution Review

From scattered spend to one honest cost per job.



HUMAN CONTROL

AI reports what happened. The owners decide where money goes.

TOOLS IN THIS FLOW

CallRail, Zoho CRM source field, QuickBooks spend export, AI workspace, Looker Studio.

01 WORKFLOW DIAGRAM 3

Review and Referral Engine

From a finished job to local proof that brings the next one.

1 A job is marked complete in Zoho, which triggers the request automatically.



2 AI drafts the review request in the voice of the rep who sold the job.



3 The rep approves and the request goes out the day the work finishes.



4 A new review arrives and AI drafts a response for approval.



5 Anything below four stars routes to Paul or Lauren before anyone replies.

HUMAN CONTROL

AI drafts and times. A person approves every request, every reply, and every referral ask.

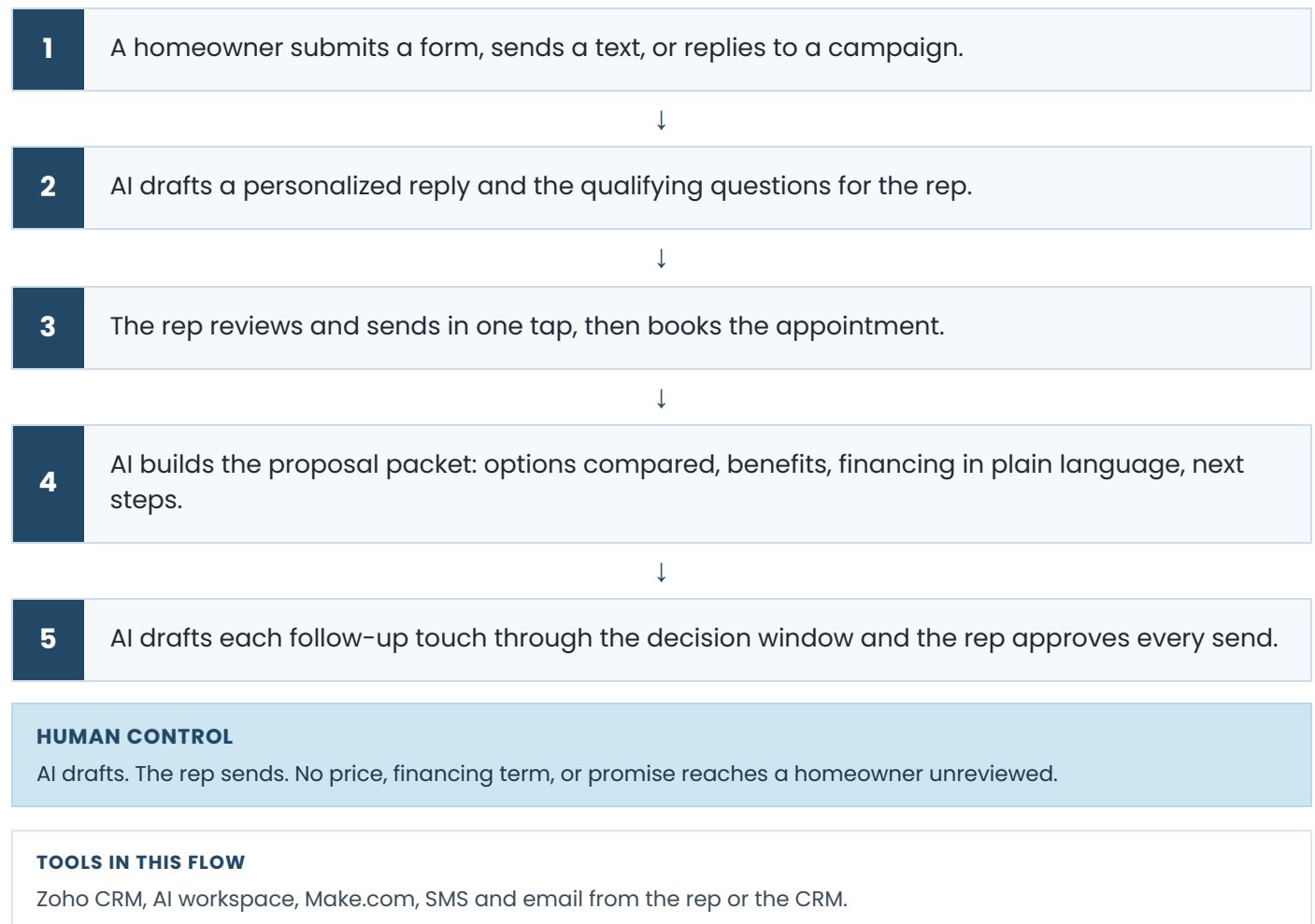
TOOLS IN THIS FLOW

Zoho CRM job status, NiceJob or equivalent, Google Business Profile, AI workspace.

01 WORKFLOW DIAGRAM 4

Lead Response and Sales Follow-Up

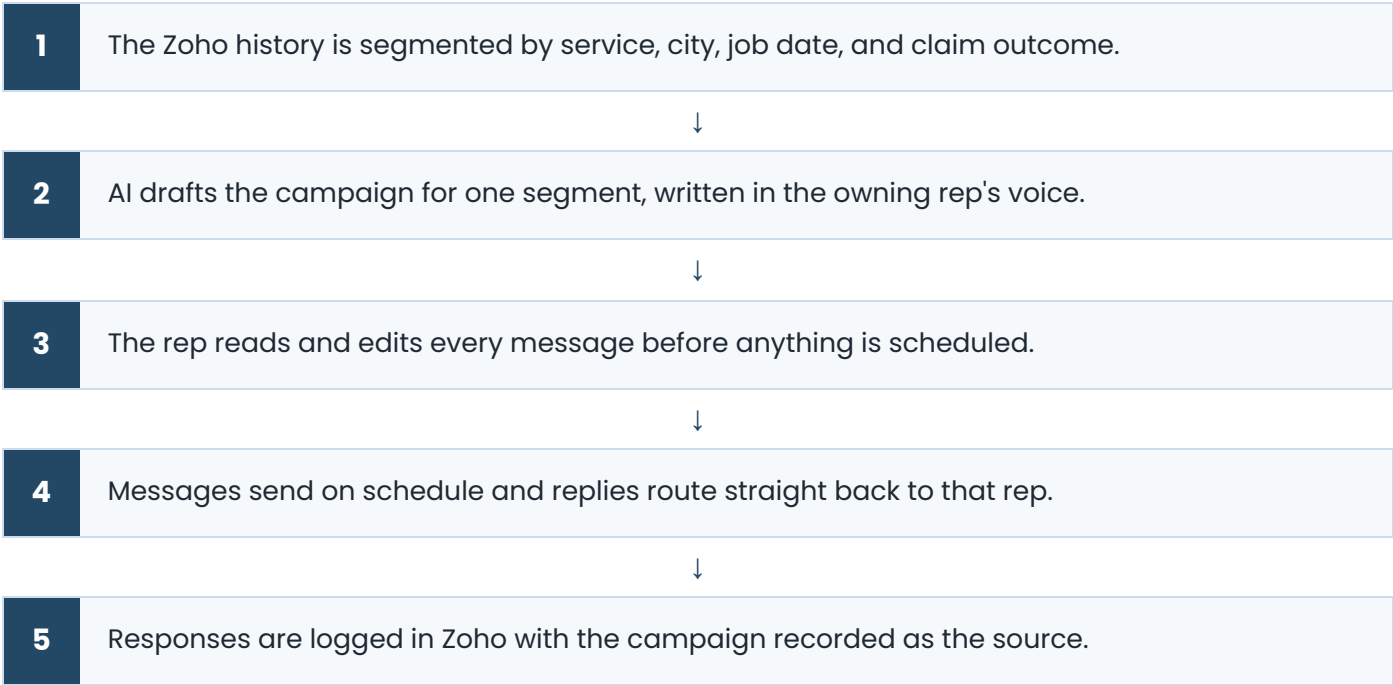
From a new inquiry to a window sale that does not go cold.



01 WORKFLOW DIAGRAM 5

Past Customer Reactivation

From fifteen years of history to booked window and gutter work.



HUMAN CONTROL

AI drafts and schedules. The rep owns the relationship and approves the words.

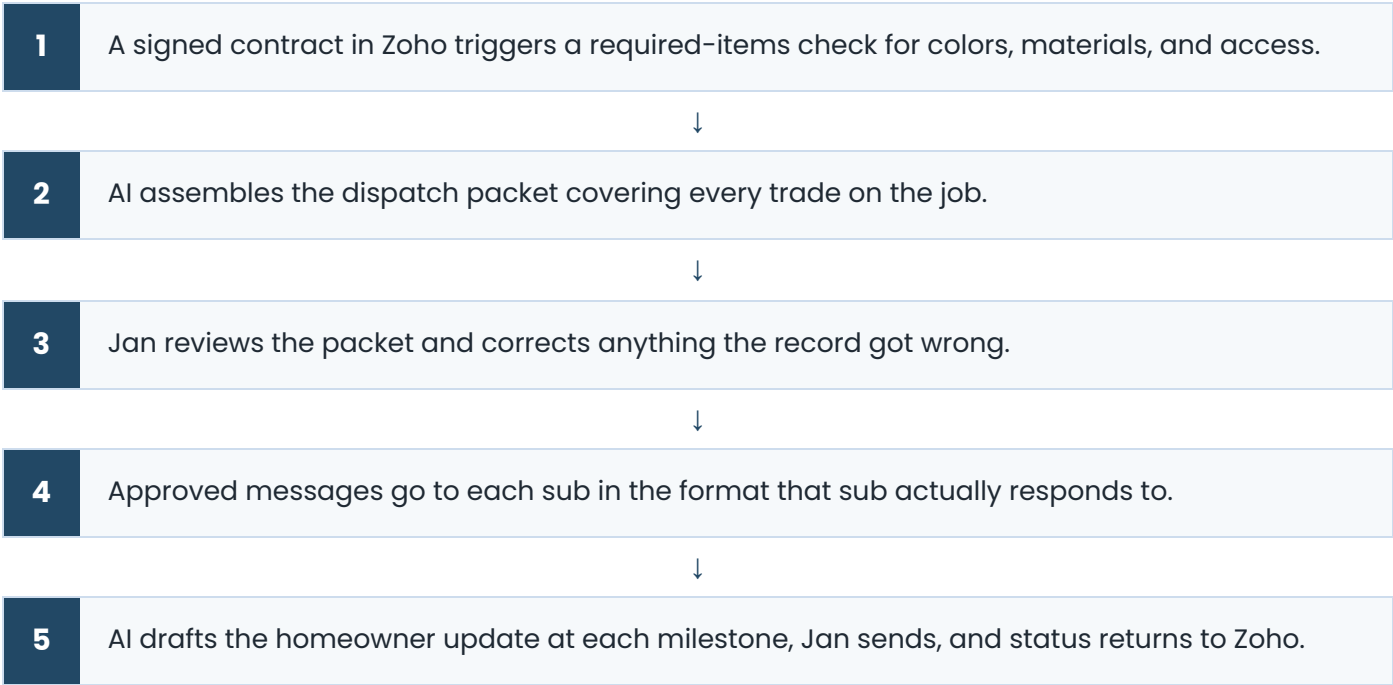
TOOLS IN THIS FLOW

Zoho CRM segments and Campaigns, AI workspace for drafting, SMS and email delivery.

01 WORKFLOW DIAGRAM 6

Job Coordination and Customer Updates

From a two-page trade list to one packet and an informed homeowner.



HUMAN CONTROL

AI prepares and tracks. Jan approves every message and every date.

TOOLS IN THIS FLOW

Zoho CRM job record, AI workspace, Make.com, SMS to subs and homeowners.

01 WORKFLOW DIAGRAM 7

Pipeline Capture and Close-Rate Visibility

From a voice note in the truck to a number leadership can trust.

1 The rep records a short voice note or fills a brief mobile form right after the appointment.



2 AI drafts the Zoho record: contact, address, service, stage, next step, and date.



3 The rep reviews the draft and confirms it in one tap.



4 The record enters the pipeline at the correct stage with a source attached.



5 Stale or incomplete records appear automatically on the weekly leadership brief.

HUMAN CONTROL

AI does the typing. The rep confirms every fact before it counts.

TOOLS IN THIS FLOW

Phone voice notes or a short mobile form, AI workspace, Make.com, Zoho CRM reports.

02 PROMPT LIBRARY

Ten prompts written for Trinity

Copy, paste, replace the bracketed fields, and review every output before it is used. These prompts return drafts and exception lists, never finished work.

	Prompt	Primary use
01	New Inquiry Response and Qualification	Answer a new lead in minutes with a reply the rep approves and sends.
02	Monthly Marketing Channel Review	Compare what each channel cost against what it actually produced.
03	Local Content and Google Business Profile Pack	Fix the free visibility before buying another paid program.
04	Review Request and Response Engine	Turn every finished job into proof, in the rep's own voice.
05	Past Customer Reactivation Segments and Sequences	Turn Trinity's own history into off-season demand.
06	Window Proposal Packet and Follow-Up	Give the homeowner a clear decision, then stay present all week.
07	Homeowner Update by Job Stage	Keep the customer informed without crossing a licensing line.
08	Field Notes to Zoho Record	Make entering a deal faster than avoiding it.
09	Weekly Pipeline and Close-Rate Brief	One factual page for the leadership meeting.
10	Job Dispatch Packet and Customer Status Updates	Assemble one job once, message every trade, and keep the homeowner informed.

The rule behind all ten

Every prompt requires the model to cite its source, name what it does not know, and stop short of the decision. If an output ever reads like a finished decision rather than a draft with open questions, something has gone wrong with the inputs and it should not be used.

02 PROMPT 01

New Inquiry Response and Qualification

Answer a new lead in minutes with a reply the rep approves and sends.

BEST FIT

ChatGPT Business or Claude Team, run by the rep or by Jan.

HUMAN REVIEW

The rep sends every message. Nothing auto-sends to a homeowner.

USE RULE

Use approved inputs only. Verify every cited fact before it is used anywhere downstream.

ROLE

You are a sales assistant for Trinity Roofing & Construction. Draft an immediate, personal reply to a new homeowner inquiry and prepare the qualifying questions for the rep. You do not send anything.

INPUTS

- The inquiry exactly as received (form, text, email, or message): [PASTE]
- Date, time, and channel it arrived on: [PASTE]
- Assigned rep and their voice notes: [PASTE]
- Existing Zoho matches for this name, phone, or address: [PASTE]

QUALIFY FOR

- Property address and city.
- Service interest: windows, roof, repairs, gutters, paint, insulation.
- Whether damage is storm-related and when.
- Whether a claim is filed, and with whom.
- Whether they are getting other quotes, and their timeline.
- Best time to talk and preferred contact method.

RULES

- Never quote a price, promise coverage, or state that damage is covered.
- Never tell a homeowner what their insurance will or will not pay.
- Do not lock an appointment time. Offer options and let the rep confirm.
- Mark anything not stated as Not provided. Do not infer an address from an area code.
- Sound like the rep, not like a company. Short, plain, no marketing language.

OUTPUT

1. A ready-to-send reply, in both SMS and email length.
2. Three qualifying questions the rep should ask on the callback.
3. Lead summary for Zoho: name, contact, address, service, timeline, source.
4. Missing fields the rep needs to confirm.
5. A suggested follow-up time if the homeowner does not respond.

02 PROMPT 02

Monthly Marketing Channel Review

Compare what each channel cost against what it actually produced.

BEST FIT

ChatGPT Business or Claude Team, after Lauren validates the spend figures.

HUMAN REVIEW

Lauren confirms all financial figures. Paul and Lauren make every spend decision.

USE RULE

Use approved inputs only. Verify every cited fact before it is used anywhere downstream.

ROLE

Act as Trinity's marketing analyst. Compare what each channel cost against what it produced. Do not invent causes for a result.

INPUTS

- Reporting period: [MONTH / YEAR]
- Spend by channel, finance-approved: [PASTE]
- Leads by source: [PASTE]
- Appointments and signed jobs by source, with value: [PASTE]
- Data freshness and known exclusions: [PASTE]

RULES

- Use the supplied figures only. Do not estimate a missing number.
- Separate tracked leads from untracked, and state how large the untracked group is.
- Do not credit a channel for a job that has no source on the record.
- Do not recommend increasing spend on a channel with too few tracked jobs. Say more data is needed instead.
- Cite the source field or report behind every number you use.

OUTPUT

1. Channel table: Channel | Spend | Leads | Appointments | Signed jobs | Revenue | Cost per lead | Cost per job.
2. What is clearly working, what is clearly not, and what does not yet have enough data to judge.
3. Untracked spend and untracked leads, quantified.
4. Three decisions for Paul and Lauren, each with the evidence behind it.
5. Data gaps that would change the conclusion.

02 PROMPT 03

Local Content and Google Business Profile Pack

Fix the free visibility before buying another paid program.

BEST FIT ChatGPT Business or Claude Team, with real job photos and permissions.	HUMAN REVIEW Owners approve every published word, photo, and service claim.	USE RULE Use approved inputs only. Verify every cited fact before it is used anywhere downstream.
ROLE Act as a local content writer for a residential roofing and window contractor. Produce accurate local content that ranks and does not overpromise.		
INPUTS • Service area cities and both office locations: [PASTE] • Services offered, and services being removed: [PASTE] • Recent completed jobs suitable to feature, with permission confirmed: [PASTE] • Real photos available and current profile details: [PASTE] • Themes from existing reviews: [PASTE]		
RULES • Never claim a specific storm caused damage in a named neighborhood without citing a storm report. • No coverage or payout claims. No language suggesting Trinity gets claims approved. • Do not name a customer, address, or carrier without written permission. • Do not list services Trinity does not sell, including commercial roofing. • Write like a contractor, not a marketer. Plain language only.		
OUTPUT 1. Profile audit: fields to fix, services to add or remove, categories, and service areas, for both locations. 2. Eight profile posts with headline, body, photo suggestion, and call to action. 3. Three local page outlines by city and service, weighted toward windows, with H1, sections, and FAQs. 4. Ten homeowner questions with plain answers, written so AI assistants can quote them accurately. 5. A four-week publishing calendar.		

02 PROMPT 04

Review Request and Response Engine

Turn every finished job into proof, in the rep's own voice.

BEST FIT ChatGPT Business or Claude Team, triggered from a completed job in Zoho.	HUMAN REVIEW A person approves every request and every reply, without exception.	USE RULE Use approved inputs only. Verify every cited fact before it is used anywhere downstream.
ROLE Draft review requests and review responses for Trinity Roofing. You prepare the words. A person always sends them.		
INPUTS - Completed job: service, city, dates, and anything notable about the experience: [PASTE] - Owning rep and crew: [PASTE] - The homeowner's name and preferred contact method: [PASTE] - For a response: the review text, rating, and reviewer name: [PASTE]		
RULES - Write the request in the voice of the rep who sold the job, not the company. - Never offer anything of value in exchange for a review. - Never dispute facts publicly. For anything below four stars, draft an offline-first response and flag it for Paul or Lauren. - Do not reference claim details, insurance carriers, or job value in a public reply. - Keep replies short, specific, and human. No template language.		
OUTPUT - Review request in SMS and email versions, with the direct review link placeholder. - One follow-up nudge for homeowners who do not respond. - Response drafts for a five-star, a four-star, a three-star, and a one-star review. - For anything below four stars: the internal note explaining what needs to be resolved first. - A referral ask for customers who already left five stars.		

02 PROMPT 05

Past Customer Reactivation Segments and Sequences

Turn Trinity's own history into off-season demand.

BEST FIT ChatGPT Business or Claude Team, using an approved Zoho export.	HUMAN REVIEW The owning rep approves every message before the first send.	USE RULE Use approved inputs only. Verify every cited fact before it is used anywhere downstream.
ROLE Build reactivation segments from Trinity Roofing's customer history and draft approval-ready sequences for the priority segments.		
INPUTS • Customer and lead export with service, city, close date, claim outcome, last contact, and rep: [PASTE] • Owing rep's name and voice notes: [PASTE] • Services to feature this cycle: [PASTE] • Any current offer, if one exists: [PASTE]		
SEGMENTS TO CONSIDER • Roof customers who never bought windows. • Window customers with no gutters, paint, or insulation. • Repair-only customers who never ran a full claim. • Claims that were never approved, still warm. • Leads that went quiet before a contingency was signed. • Everyone in a city where Trinity wants more density.		
RULES • Write in the owning rep's voice. No hype and no urgency that is not true. • Never claim a property has damage or that a claim will be approved. • One clear ask per message. Include an opt-out on every SMS. • Do not reference a customer's claim amount, deductible, or carrier. • Mark every merge field clearly so nothing sends with a blank.		
OUTPUT 1. Segment table: Segment Definition Count to pull from Zoho Why now Owing rep. 2. Sequence per priority segment: four to five touches with channel, timing, subject, body, and call to action. 3. Reply handling: what the rep does with a yes, a maybe, and a no. 4. A short list of what should not be sent to this segment.		

02 PROMPT 06

Window Proposal Packet and Follow-Up

Give the homeowner a clear decision, then stay present all week.

BEST FIT

ChatGPT Business or Claude Team, run by the rep after the appointment.

HUMAN REVIEW

The rep confirms every price, product detail, and financing statement.

USE RULE

Use approved inputs only. Verify every cited fact before it is used anywhere downstream.

ROLE

Prepare a homeowner-ready window replacement packet and the follow-up sequence for the decision window. You do not set prices.

INPUTS

- Home details, window count, and what the homeowner said they care about: [PASTE]
- Options being presented with rep-supplied pricing: [PASTE]
- Product specifications and warranty terms: [PASTE]
- Financing options available and their published terms: [PASTE]
- Rep name, voice notes, and the timeline the homeowner gave: [PASTE]

RULES

- Use only the prices, specs, and terms supplied. Never calculate, estimate, or infer a price.
- Never state or imply that insurance will cover a retail window job.
- Present financing factually. No payment claims, no approval promises, no APR that was not supplied.
- Do not disparage a competitor or a competing product.
- If a specification or term is missing, write Needs confirmation instead of filling the gap.

OUTPUT

1. One-page comparison of the options, in plain language a homeowner can read in two minutes.
2. The energy-efficiency and comfort benefits, tied only to the supplied specifications.
3. Financing explained simply, with the exact supplied terms and no others.
4. What happens next: timeline, install expectations, and warranty in one short section.
5. A four-touch follow-up sequence across the decision week, each draft ready for the rep to send.
6. Everything the rep must confirm before this goes out.

02 PROMPT 07

Homeowner Update by Job Stage

Keep the customer informed without crossing a licensing line.

BEST FIT

ChatGPT Business or Claude Team.
Reps and Jan run this from a phone.

HUMAN REVIEW

A person approves and sends. Nothing
auto-sends to a homeowner.

USE RULE

Use approved inputs only. Verify every
cited fact before it is used anywhere
downstream.

ROLE

Draft stage-appropriate homeowner communication for Trinity Roofing to review and send.

INPUTS

- Stage: [CONTINGENCY SIGNED / WAITING ON ADJUSTER / CLAIM APPROVED / CLAIM NOT APPROVED / CONTRACT SIGNED / MATERIALS ORDERED / SCHEDULED / IN PROGRESS / COMPLETE]
- Customer name, job type, and city: [PASTE]
- Sender name and voice notes: [PASTE]
- Known dates and what the homeowner has already asked: [PASTE]

RULES

- Educate, do not advise on coverage. Trinity discusses scope, it does not negotiate.
- Never tell a homeowner what their carrier should pay, and never suggest inflating anything.
- Never draft a message addressed to an adjuster, insurer, or mortgage company.
- Set expectations only with dates that were supplied. Give a window, never an exact hour.
- Keep it short and plain. No jargon and no filler.

OUTPUT

1. The update for this stage, in SMS and email versions.
2. The two most likely homeowner questions at this stage, with plain answers.
3. What the sender should confirm before sending.
4. The next update and roughly when it should go out.

02 PROMPT 08

Field Notes to Zoho Record

Make entering a deal faster than avoiding it.

BEST FIT ChatGPT Business, Claude Team, or a mobile voice-note workflow.	HUMAN REVIEW The rep confirms every field before the record is created.	USE RULE Use approved inputs only. Verify every cited fact before it is used anywhere downstream.
ROLE Turn a Trinity Roofing rep's voice note or field notes into a draft CRM record. Do not create the record. Draft it for the rep to confirm.		
INPUTS • Voice note transcript or field notes: [PASTE] • Date, time, and rep: [PASTE] • Existing Zoho matches for this name, phone, or address: [PASTE]		
REQUIRED FIELDS • Name, phone, email. • Property address and city. • Service interest and whether it is storm-related. • Claim filed yes or no, and carrier only if stated. • Contingency or contract signed yes or no. • Next step, owner, and date. Source and rep.		
RULES • Extract only what is stated. Write Not stated for everything else. • Do not guess a value, a carrier, a date, or a price the rep did not say. • Flag a conflict with an existing record instead of overwriting it. • Do not soften or reinterpret what the rep said about the appointment.		
OUTPUT 1. Draft record covering every required field. 2. The Not-stated list the rep needs to complete. 3. Possible duplicate matches, with the reason for each. 4. Suggested pipeline stage and next action with a date. 5. A one-line confirmation prompt for the rep.		

02 PROMPT 09

Weekly Pipeline and Close-Rate Brief

One factual page for the leadership meeting.

BEST FIT ChatGPT Business or Claude Team, after the weekly Zoho hygiene check.	HUMAN REVIEW Lauren reviews before the brief is used to judge anyone.	USE RULE Use approved inputs only. Verify every cited fact before it is used anywhere downstream.
ROLE Act as an operational analyst for Trinity Roofing. Turn current Zoho records into a short, factual brief for the weekly leadership meeting.		
INPUTS • Open leads and deals by stage with dates, owners, and record IDs: [PASTE] • Appointments held and outcomes this week: [PASTE] • Jobs in production with stage and install date: [PASTE] • Campaign and channel activity for the week: [PASTE] • Data last updated: [DATE / TIME]		
RULES • Use the supplied records only. Do not assume progress that is not recorded. • Cite a record ID for every item raised. • Flag stale records rather than guessing their status. • Do not include supplement scope, carrier positions, or any claim negotiation detail. • Select no more than five priorities.		
OUTPUT 1. Week at a glance: new leads by source, appointments set and held, contracts signed, jobs installed. 2. Close rate and time to decision by rep and by service line, with the record count behind each. 3. Five priorities: Item Why now Owner Date Record ID. 4. Records that are stale or missing required fields, grouped by owner. 5. Decisions Paul or Lauren need to make this week.		

02 PROMPT 10

Job Dispatch Packet and Customer Status Updates

Assemble one job once, message every trade, and keep the homeowner informed.

BEST FIT ChatGPT Business or Claude Team, run from the Zoho job record.	HUMAN REVIEW Jan approves the packet and every outbound message.	USE RULE Use approved inputs only. Verify every cited fact before it is used anywhere downstream.
ROLE You are the production coordinator's assistant. Assemble one job's dispatch packet, draft each sub's message, and draft the homeowner update for Jan to approve.		
INPUTS • Job record: address, homeowner, contact, target install: [PASTE] • Full trade list for this job: [PASTE] • Materials and color selections: [PASTE] • Access notes and house photo reference: [PASTE] • Sub list with preferred contact method and message style: [PASTE] • Homeowner time window and anything still outstanding: [PASTE]		
RULES • Do not commit a date, a crew, or a price. Propose only. • List any missing item (color, material, permit, access) as a blocker before scheduling. • Match each sub's preferred format. Short and specific for text-first subs. • Give the homeowner a window, never an exact time. • Never include claim details or job value in a message to a sub.		
OUTPUT 1. Job packet: address, photo reference, homeowner window, trade list, scope per trade, materials, access notes. 2. Blockers that must clear before scheduling, each with an owner. 3. A draft message per sub, ready for Jan to send. 4. Confirmation tracker: Sub Trade Sent Confirmed Follow-up date. 5. The homeowner update for this milestone, and a draft chase message for any sub not confirmed.		

03 IMPLEMENTATION GUIDES

Plain-language setup steps

Each guide gives the order to set things up, a simple flow to follow, and the condition that says it is safe to turn on.

Guide		Purpose
01	Zoho CRM data foundation	Build reliable records before asking AI to summarize anything.
02	Local visibility and content engine	Make the free assets work before buying paid ones.
03	Call and form attribution	Put a source on everything so spend decisions get easy.
04	Review and referral engine	The cheapest visibility Trinity can buy is a finished job.
05	Secure AI workspace	One managed account, one prompt library, clear data rules.
06	Automation layer	Move approved data between systems without autonomous decisions.
07	Lead response and follow-up sequences	Answer in minutes, then follow up on a schedule instead of memory.
08	Dispatch packet and customer updates	Meet the subs where they are, and keep the homeowner ahead of the question.

Operating standard

Test on selected jobs or copies first. Confirm the named reviewer, the error path, and how to roll it back. Activate only the approved scope, and keep purchasing, finances, claim work, published content, and every outside message under human control.

03 IMPLEMENTATION GUIDE 01

Zoho CRM data foundation

Build reliable records before asking AI to summarize anything.

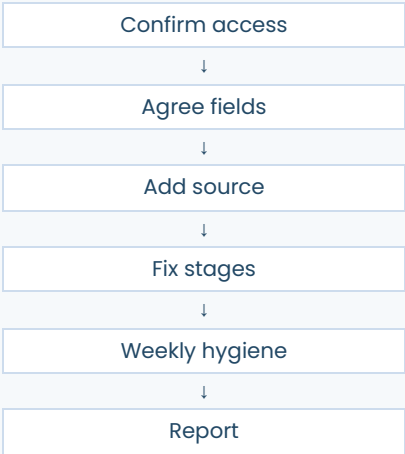
SET UP IN THIS ORDER

- 1. Confirm with Business 411 exactly what Trinity can change without a developer, and document admin access.
- 2. Agree the minimum required fields with the reps before enforcing anything: contact, address, service, stage, source, next step.
- 3. Add the source field to every lead entry point so no lead can be saved without one.
- 4. Build the pipeline stages to match the real process, including a separate path for retail window and repair work.
- 5. Create the weekly hygiene view: records missing fields, records with no activity, records stuck in a stage.
- 6. Report on a few reps first, and enforce only once entry is genuinely faster than avoidance.

ACTIVATE WHEN

Every lead carries a source, the required fields are agreed, and the pipeline view matches what actually happens on a job.

SIMPLE FLOW



03 IMPLEMENTATION GUIDE 02

Local visibility and content engine

Make the free assets work before buying paid ones.

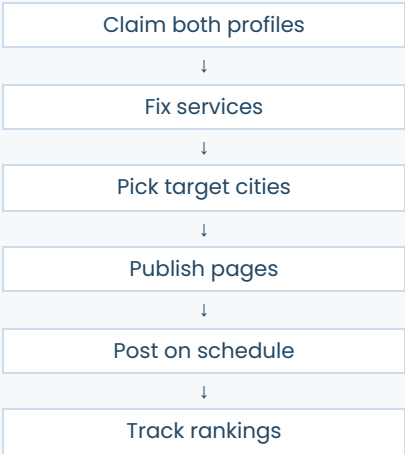
SET UP IN THIS ORDER

- 1. Claim and complete both Google Business Profiles: services, service areas, hours, categories, and real job photos.
- 2. Remove commercial roofing and anything else Trinity does not sell so the profile matches the business.
- 3. Pick the target cities and services, weighted toward windows and repairs since that is the work available now.
- 4. Publish one city and service page at a time, each with real photos and real homeowner questions answered.
- 5. Post to both profiles on a schedule using photos from completed jobs.
- 6. Track rankings and profile-driven calls by city and service so the work is provable.

ACTIVATE WHEN

Both profiles are complete and posting, target pages are live, and profile-driven calls are rising month over month.

SIMPLE FLOW



03 IMPLEMENTATION GUIDE 03

Call and form attribution

Put a source on everything so spend decisions get easy.

SET UP IN THIS ORDER

- 1. Create a tracking number per channel and per location, then swap them into the website, both profiles, ads, and print.
- 2. Add form tracking to the website so web leads carry a source too.
- 3. Map the source values into the Zoho field so they survive all the way to a closed job.
- 4. Turn on recording and transcription for coaching only. The tracking system never answers a call.
- 5. Publish a monthly channel view and use it to decide renewals before the next invoice lands.

ACTIVATE WHEN

Every lead has a traceable source, and Lauren can state cost per job by channel without rebuilding a spreadsheet.

SIMPLE FLOW



03 IMPLEMENTATION GUIDE 04

Review and referral engine

The cheapest visibility Trinity can buy is a finished job.

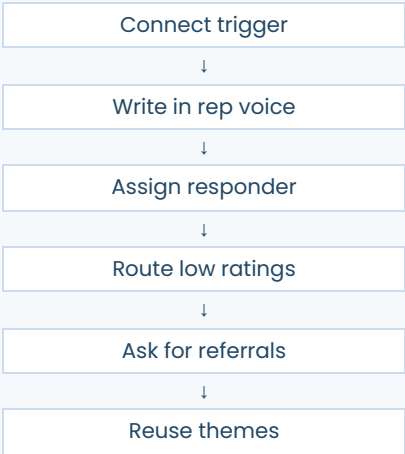
SET UP IN THIS ORDER

- 1. Connect the review tool so a completed job in Zoho triggers the request automatically.
- 2. Write the request in the voice of the rep who sold the job, and time it for the day the work finishes.
- 3. Assign one owner for responses, with AI drafting and a person approving every reply.
- 4. Set the rule that anything below four stars routes to Paul or Lauren before a public reply exists.
- 5. Add the referral ask to customers who already left five stars.
- 6. Feed recurring review themes back into the website and profile content.

ACTIVATE WHEN

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

SIMPLE FLOW



03 IMPLEMENTATION GUIDE 05

Secure AI workspace

One managed account, one prompt library, clear data rules.

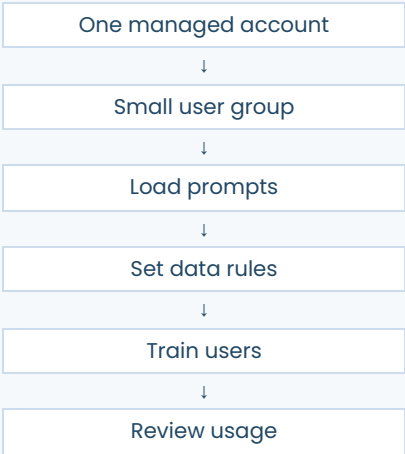
SET UP IN THIS ORDER

- 1. Choose one managed business account instead of personal logins, with central billing and admin control.
- 2. Start with a small group: Paul, Lauren, and one rep who will actually use it.
- 3. Load this prompt library as saved prompts so everyone runs the same instructions.
- 4. Put the data rule in writing: no policy numbers, no claim documents, no full customer exports pasted into any AI tool.
- 5. Review usage, output quality, and correction patterns on a set schedule, and retire prompts nobody uses.

ACTIVATE WHEN

Admins control access, the prompt library is in daily use, and confidential customer and claim information stays out of AI tools.

SIMPLE FLOW



03 IMPLEMENTATION GUIDE 06

Automation layer

Move approved data between systems without autonomous decisions.

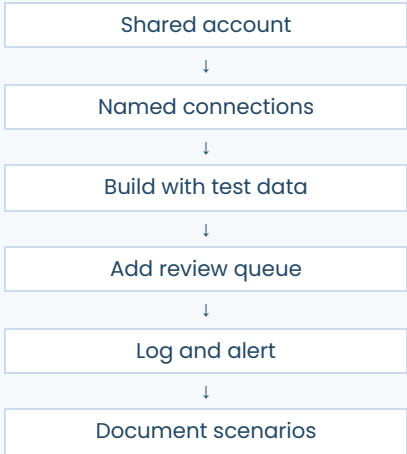
SET UP IN THIS ORDER

- 1. Create one shared automation account owned by the internal systems owner and documented for Trinity.
- 2. Use named connections with least-privilege access. No personal passwords inside shared scenarios.
- 3. Build every scenario with test data first, plus a clear trigger, a validation step, a review queue, an error path, and a log.
- 4. Start with low-risk work: writing a lead into Zoho, tagging a source, drafting a message, refreshing a dashboard.
- 5. Keep a one-page record per scenario: purpose, owner, inputs, outputs, trigger, failure alert, and change history.

ACTIVATE WHEN

Each scenario passes its test cases, a human approval is visible in the flow, errors are logged, and the owner can stop or reverse it.

SIMPLE FLOW



03 IMPLEMENTATION GUIDE 07

Lead response and follow-up sequences

Answer in minutes, then follow up on a schedule instead of memory.

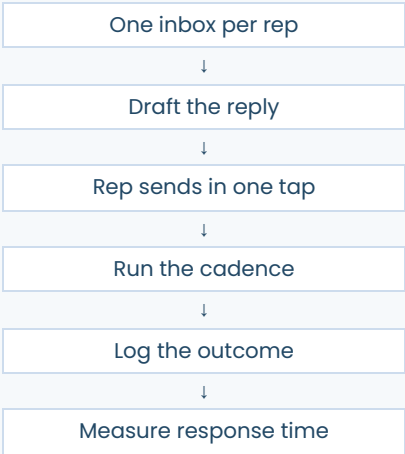
SET UP IN THIS ORDER

- 1. Route every web form, text, and message into one place the assigned rep actually watches.
- 2. Build the draft-reply prompt so the rep can review and send in one tap from a phone.
- 3. Write the window follow-up cadence for the decision week, and a cadence for each claim stage.
- 4. Build the proposal packet template so only rep-supplied prices and specs ever appear in it.
- 5. Set the rule in the tool: every message is a draft until the rep sends it.
- 6. Measure minutes to first response weekly and tune the cadence from what actually gets replies.

ACTIVATE WHEN

First response is measured in minutes, the window sequence runs the same way every time, and no message reaches a homeowner unreviewed.

SIMPLE FLOW



03 IMPLEMENTATION GUIDE 08

Dispatch packet and customer updates

Meet the subs where they are, and keep the homeowner ahead of the question.

SET UP IN THIS ORDER

1. Write down what every job needs before it can be scheduled: colors, materials, permits, access, homeowner window.
2. Build the packet template in Zoho so information is assembled from the record instead of retyped.
3. Record each sub's preferred contact method and message style once, then reuse it every job.
4. Draft each message from the packet and have Jan approve before anything sends.
5. Add the homeowner milestone updates so nobody has to call Jan for a status.
6. Track confirmations in one view, set a review date for silent subs, and write outcomes back to the job record.

ACTIVATE WHEN

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

SIMPLE FLOW

Define required items

↓

Build packet template

↓

Store sub preferences

↓

Draft messages

↓

Jan approves

↓

Update the homeowner