



FREE CHECKLIST · FOR UK TRADES AND SMALL BUSINESSES

WHICH 3 JOBS SHOULD YOU HAND TO AI?

Ten minutes, a pen and a cup of tea. By the end you'll know which three bits of admin are worth handing to an AI helper first, and which ones to keep for yourself.



A QUICK WORD FIRST

I'm Alex. I've spent years working in home improvements, out on the road with tradespeople and builders, not behind a desk. I'm not a techie, and for years the quotes, emails and chasing landed on me at 9pm. Now AI helpers do the first draft of a lot of that, and I check it and send it.

You don't need to understand how any of it works to use this checklist. You just need to know where your week goes. That's the bit only you can do.

HOW IT WORKS

STEP 1

Tick every job you do most weeks, and jot down roughly how long it takes.

STEP 2

Give your ticked jobs a quick score out of 8 with four simple questions.

STEP 3

Write down your top three, and what you'd want to check before anything goes out.

WHAT "AN AI HELPER" MEANS HERE

A tool set up to do one job the way you'd do it: write a first draft, sort a list, remind you, fill in a form. It does the dull 80%. You stay in charge of anything that goes to a customer.



STEP 1: WHERE DOES YOUR WEEK GO?

Tick anything you do most weeks. Don't overthink it. Next to each tick, scribble a rough time per week. Guesses are fine.

QUOTES AND FOLLOW-UPS

- | | |
|--|---------|
| ☐ Writing up quotes from site notes or a phone call | ___ hrs |
| ☐ Chasing quotes that have gone quiet | ___ hrs |
| ☐ Answering "how much would it be?" messages | ___ hrs |
| ☐ Writing material or parts lists | ___ hrs |

DIARY AND BOOKINGS

- | | |
|--|---------|
| ☐ Booking in jobs and sending confirmations | ___ hrs |
| ☐ Reminder messages the day before | ___ hrs |
| ☐ Juggling next week when something moves | ___ hrs |
| ☐ Reminding regular customers they're due | ___ hrs |

PAPERWORK

- | | |
|---|---------|
| ☐ Filling in job sheets or reports | ___ hrs |
| ☐ Keeping receipts and notes in order | ___ hrs |
| ☐ Writing up meeting or site-visit notes | ___ hrs |
| ☐ Drafting proposals or letters | ___ hrs |

EMAILS AND MESSAGES

- | | |
|---|---------|
| ☐ Wading through the inbox to find what matters | ___ hrs |
| ☐ Replying to the same questions again and again | ___ hrs |
| ☐ Turning job notes into a tidy customer email | ___ hrs |
| ☐ Following up with suppliers | ___ hrs |

GETTING PAID

- | | |
|---|---------|
| ☐ Writing and sending invoices | ___ hrs |
| ☐ Working out who still owes you | ___ hrs |
| ☐ Chasing late payers politely | ___ hrs |
| ☐ Matching payments to invoices | ___ hrs |

GETTING THE WORD OUT

- | | |
|---|---------|
| ☐ Writing social posts about finished jobs | ___ hrs |
| ☐ Asking happy customers for a review | ___ hrs |
| ☐ Replying to reviews | ___ hrs |
| ☐ Writing product or service descriptions | ___ hrs |

ANYTHING ELSE?



STEP 2: SCORE YOUR JOBS

Copy your biggest ticked jobs into the table. For each one, score these four questions: 0 for no, 1 for sometimes, 2 for yes.

- A Often:** does it come round every week, or more?
- B Same steps:** do you do it roughly the same way each time?
- C Draft is fine:** would a decent first draft save you most of the effort?
- D Easy to check:** could you spot a mistake in a minute before it goes out?

JOB	HRS / WEEK	A	B	C	D	TOTAL / 8
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READING YOUR SCORES

6 to 8: a strong first job for a helper.

4 to 5: worth a try once the first one's working.

0 to 3: probably best left with you for now.

If two jobs tie, pick the one that eats more hours.

KEEP THESE WITH YOU

- Anything that needs passwords, card or bank details
- The final say on prices and what you agree to
- Safety, legal or certificate sign-offs
- Tricky conversations with an unhappy customer
- Anything involving health or other sensitive details



STEP 3: YOUR TOP THREE

Write down your three highest scores. Being clear about what you'd check is what makes a helper safe to use.

1

The job

What the helper would do (e.g. "draft a follow-up 3 days after a quote")

What I'd check before it goes out

2

The job

What the helper would do

What I'd check before it goes out

3

The job

What the helper would do

What I'd check before it goes out

BEFORE YOU START: FIVE HOUSE RULES

1. **You stay in charge.** Helpers draft, you approve. Nothing goes to a customer without your say-so.
2. **Your accounts, in your name.** Set tools up on your own accounts so you own the logins and the data.
3. **Keep sensitive stuff out.** No passwords, card or bank details in AI tools.
4. **Check the privacy settings.** Where a tool lets you, switch off using your data for training.
5. **Start with one job.** Get one helper working well before you add the next.

WANT A HAND WITH NUMBER ONE?

Try it yourself this week. If you'd rather have it set up with you, a 90-minute remote quick-win session gets your first helper working there and then, in plain English, with no hard sell.

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