

Demonstration document. "Greenline Garden Care" is a fictional business invented to show what a real audit contains. No client data appears in this sample, and any resemblance to a real business is coincidental.

WORKFLOW CLARITY AUDIT — SAMPLE

Greenline Garden Care

A fictional two-person mowing and garden-maintenance crew, Mornington Peninsula.

PREPARED BY

John Costabile, Lumomatics

FORMAT

PDF + shared document

CLIENT TIME REQUIRED

60–75 minutes

SUPPORT WINDOW

14-day Q&A after delivery

The business, as described in the intake

Two people: the owner on the tools full-time, plus one worker four days a week. Around 70 recurring maintenance clients on two-, three- or four-week cycles, plus one-off jobs — clean-ups, hedges, small landscaping — worth about \$450 on average. Recurring visits average \$180.

The stack is the common one: a personal mobile, Google Calendar, quotes agreed by text or on-site, invoices typed into Xero at night, and a whiteboard for the week's jobs. No CRM, no job-management software, no shared record of enquiries. It mostly works — until the phone rings while both people are on mowers.

Stated assumptions used throughout (from the intake questionnaire): ~35 inbound calls a week; about 60% get answered live; roughly 5 of the missed calls each week are genuine new-work enquiries; ~4 hours a week on quoting admin; ~3 hours a week on invoicing; a full rain day forces about 8 bookings to move.

01

Workflow pain map

How work actually moves through the business today, with the friction marked.

01 Enquiry arrives — phone call to the owner's mobile, or word of mouth.

Friction: ~14 of 35 weekly calls go to voicemail while the owner is on the tools. Voicemail greeting is the phone-company default; most callers hang up without leaving a message and there is no record they ever called.

02 Quote — owner visits or prices from a photo, replies by text when there's time, usually that night.

Friction: no template, no follow-up. A quote that gets no reply is never chased. Nobody knows how many quotes are outstanding.

03 Booking — agreed by text, entered into Google Calendar by the owner.

Friction: single point of entry. The worker can't see changes until the owner updates the calendar, which happens at night.

04 The work — crew does the job.

Minimal friction. This part runs well and needs no technology.

05 Weather reschedules — rain day: the owner calls or texts each affected client between jobs or at night.

Friction: ~8 bookings to move, one at a time, about 6 minutes each — roughly 48 minutes of admin per rain day, and the occasional job that falls through the crack entirely.

06 Invoice & payment — typed into Xero at night, sent by email; follow-up when the owner remembers.

Friction: ~3 hours a week, done tired, sometimes days after the job — which is also when payment disputes start.

The pattern worth naming: nothing in this business is broken during the work. Every leak is in the capture and follow-through around the work — missed enquiries, unchased quotes, slow rescheduling, late invoices. That is good news, because capture and follow-through are cheap to fix.

02

Top three improvement opportunities

1. Missed-enquiry capture

About 5 genuine new-work enquiries a week currently reach voicemail. Scenario arithmetic, not a promise: if a proper missed-call routine recovers even 3 of the 5, the 2 still lost represent $2 \times \$450 \times 40\% \text{ win rate} = \text{\$360 a week}$ in expected work — about **\\$18,720 a year** — still on the table. Before the fix, all 5 are at risk. This is the single biggest number in the business and it costs nothing to address (Section 03).

2. Quote templates and a 48-hour follow-up

Quoting is ~4 hours a week of night admin with no consistency and no chase. A standard quote format (three sizes: mow-and-tidy, clean-up, landscaping) plus one follow-up text at 48 hours turns "sent and forgotten" into a managed pipeline. The follow-up is one saved template, sent from a five-minute Friday review of the outstanding-quotes list.

3. Weather-day batch rescheduling

Rain days are predictable chaos: ~48 minutes of one-at-a-time calls, done while wet. A calendar tag for weather-flexible jobs plus one saved broadcast message brings a rain-day reshuffle down to about 10 minutes, and the affected clients hear earlier, which they read as professionalism rather than cancellation.

03

The recommended quick win: a missed-call routine that costs \$0

The obvious pitch here is an AI receptionist. It is not the first move, and it's worth being clear about why: at this call volume, a managed voice agent costs more than the problem once a free routine is in place. The honest first fix uses the phone already in the owner's pocket.

1. **Rewrite the voicemail greeting** so a missed call still captures the job: ask for suburb, the kind of work, and a photo by text. Callers who text a photo have self-qualified — they're serious.
2. **Set up the one-tap declined-call reply** (both iPhone and Android support responding to a declined call with a saved text) using the template below, so a call missed on the mower still gets a response within seconds.
3. **Keep a shared callback list** — a pinned note or spreadsheet both people can see — and protect 15 minutes at 4:30pm to work through it. Same time every day, so callers can be told exactly when to expect the return call.

When a voice agent becomes worth it: a managed Standard-tier agent runs \$549 a month — about \$127 a week. If, after four weeks of keeping the callback list, the log shows more than roughly 5 new-work enquiries a week still being lost (not just missed — lost), the arithmetic starts to favour the agent and it's worth a conversation. Below that, keep the \$127 and the routine. The callback list is also the evidence either way — that's why it comes first.

04

Reusable templates and prompts

Missed-call text reply (one-tap)

Sorry I missed you — on the tools. If it's about a garden job, text me the suburb and a photo of the area and I'll call you back after 4:30 today. — Greenline Garden Care

48-hour quote follow-up

Hi [name], following up on the quote for [job] at [suburb]. Happy to adjust the scope if it's not quite right — or if the timing's wrong, tell me and I'll stop bothering you. Either way, thanks for asking us.

Rain-day broadcast

Weather's beaten us today, [name] — your visit is moving to [new day]. Nothing you need to do; reply here if that day doesn't work. Thanks for your patience.

Voice-note-to-quote prompt (for ChatGPT or similar)

Here is a transcript of my voice note about a garden job I looked at today. Turn it into a structured quote draft with these fields: scope of work, access notes, materials needed, estimated hours (low-high), and anything unclear I should check with the client. Do not set a price — pricing is my decision. Flag anything I described vaguely.

The last two sentences are the important ones. The tool structures; the owner prices.

05

Implementation roadmap

- **Week 1:** Missed-call routine — greeting, one-tap reply, shared callback list, 4:30 slot. One evening of setup.
- **Weeks 2–3:** Quote templates and the Friday outstanding-quotes review with the 48-hour follow-up text.
- **Week 4:** Weather tags in the calendar and the rain-day broadcast message. Test on the next wet day.
- **Month 2:** Same-day invoicing using the voice-note prompt on the drive home (passenger or parked) so Xero entry becomes a 20-minute batch, not a 3-hour night.
- **Month 2 checkpoint:** Review the callback log. Decide on job-management software (see Section 06) and whether the voice-agent arithmetic in Section 03 has changed.

What stays manual, deliberately

- **Pricing.** Every quote number is the owner's. No tool sets a price.
 - **The first conversation with a new client.** That call is where trust and scope are set — it should be a person for as long as volume allows.
 - **Complaints and anything that went wrong.** Automation ends the moment a client is unhappy.
 - **Quality checks on site.** Obviously.
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06

Tool recommendations

Start with what's already paid for. Lumomatics has no affiliate or reseller arrangements with any tool named here.

- **Keep:** Xero (invoicing works; the problem is when invoices get typed, not where), Google Calendar (fix is shared visibility and tags, not replacement), the existing mobile.
- **Add now:** nothing paid. The quick win and the first month of the roadmap are deliberately \$0 so the callback log can generate real numbers first.
- **Decide at the Month-2 checkpoint:** a job-management layer, once the enquiry volume is visible. For a crew this size the realistic candidates are a trades-specific tool or a configurable base like Airtable — the trade-offs are covered in the ServiceM8 vs Airtable comparison, and the callback log from Week 1 is exactly the data that makes that choice obvious.
- **Skip for now:** a CRM migration (nothing to migrate yet), a website chatbot (enquiries are phone-first), an AI email assistant (email volume doesn't justify it), and a managed voice agent (revisit only if the Section 03 threshold is met).

What was not recommended, and why that matters

This audit recommends no paid software, no subscription and no Lumomatics build. That is the honest result for this scenario at this volume — and it's the point of the audit being a fixed \$399 rather than a free sales call: the deliverable has to be worth the fee on its own, whether or not any further work ever happens. When the numbers do justify a build, the audit fee credits toward it in full.

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