

MERCANTILE

AI Playbook for Home Services.

How the best-run shops in your market are using AI to cut costs, free up their team, and take more jobs.

10+

Hours saved
per employee / week

\$24K

Average savings
after adopting AI

45%

Of small businesses
still not using AI

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Start here.

Three things to do right now.

No software to download, no learning curve, just give it a try.

1

Generate a job estimate with AI.

30 seconds

Go to claude.ai. Type: "5 ton Trane AC replacement, 2 story house, existing ductwork, Phoenix AZ. Write an itemized estimate with equipment, labor, and timeline." You just did 20 minutes of work in one prompt.

2

Respond to your Google reviews with AI.

3 minutes

Paste your last 5 Google reviews into Claude and type: "Write a professional, friendly response to each of these." Post them. You just handled a week's worth of review management in 3 minutes.

3

Turn on missed-call text-back.

2 minutes

Your phone system already has this. One setting. Every missed call instantly gets a text: "Sorry I missed you, how can I help?" You start capturing leads tonight that you're losing right now.

Now imagine this across your entire operation.
That's what Mercantile is for.

A typical Monday.

Before and after.

BEFORE AI

6:00 AM

Dispatcher arrives early to manually plan routes for 12 techs. Juggles spreadsheets and sticky notes.

7:30 AM

Calling customers to confirm appointments. Three don't pick up. Two need to reschedule. Chaos begins.

10:00 AM

Emergency call comes in. Dispatcher spends 30 minutes reshuffling the entire afternoon schedule.

1:00 PM

Tech finishes a job. Spends 20 minutes writing up notes and updating the CRM from his truck.

4:00 PM

Office manager manually creates invoices from work orders. Misses a line item. Has to redo it.

5:30 PM

No one remembered to ask for reviews. Another week of zero new Google reviews.

AFTER AI

6:00 AM

Routes auto-generated overnight based on job priority, tech skills, and geography. Dispatcher reviews and approves in 10 min.

7:30 AM

Automated texts went out at 7 AM. Three confirmed. Two rescheduled themselves online. Board is clean.

10:00 AM

Emergency flagged. AI re-optimizes affected routes in 30 seconds. Techs get updated ETAs automatically.

1:00 PM

Tech voice-dictates notes. AI transcribes, categorizes, and updates CRM. On to the next job in 3 minutes.

4:00 PM

Invoices auto-generated from job completion data. Customer gets emailed before the tech leaves the driveway.

5:30 PM

Review requests sent automatically 2 hours after each completed job. Three 5-star reviews by dinner.

Your team spends 36 hours a week on work AI can do in minutes.

1

Smart Scheduling & Route Optimization

Optimized daily routes built automatically from tech location, skills, and priority. Emergency jobs slotted in without blowing up the whole board.

14 hrs/wk >> 5 hrs/wk

\$23K/yr saved

2

Automated Customer Communication

Reminders, confirmations, follow-ups, and review requests fire automatically. Missed calls get instant AI-powered callbacks.

8 hrs/wk >> 2 hrs/wk

\$16K/yr saved

3

AI-Assisted Quoting

Auto-generate accurate quotes from your job history, specs, and labor costs. Customers get proposals in minutes instead of days.

6 hrs/wk >> 3 hrs/wk

\$8K/yr saved

4

AI Training for Your Team

Most employees have never been shown how to use AI for their actual job. A trained team is 40% more productive. One session changes how your office runs.

40% productivity boost

10%+ revenue lift

5

Automated Admin & Reporting

CRM updates, invoices, and dashboards generate automatically from job data. Your team stops being data entry clerks.

8 hrs/wk >> 2 hrs/wk

\$16K/yr saved

Your AI tools.

Built and managed for you.

Mercantile selects, configures, and manages every tool.
No training required. No new logins. It just works.

Chiirp

AI text-back, drip campaigns, and chat. Customers get a response in seconds.

OptimoRoute

AI routing that cuts 20-30% of drive time. Jobs auto-assigned by tech and location.

n8n

Workflow automation connecting every tool in your business. More powerful than Zapier.

Claude AI

The AI your team uses daily. Voice-to-text notes, reply drafts, quotes, and reports.

Hatch

Automated follow-up triggered by CRM events. Leads worked, reviews requested.

What this looks like in real dollars.

Conservative estimates based on a 10-person HVAC company billing \$150/hour average, with one dispatcher and a part-time office admin.

\$60,000+

estimated annual savings / year one

WORKFLOW	TIME SAVED	ANNUAL VALUE
Scheduling & Dispatch	9 hrs/wk reclaimed	\$23,400
Customer Communication	6 hrs/wk reclaimed	\$15,600
Quoting & Proposals	3 hrs/wk reclaimed	\$7,800
Admin & Data Entry	6 hrs/wk reclaimed	\$15,600
AI Team Training	40% productivity boost	+10% revenue

These numbers scale with company size. A 20-tech operation typically sees 2-3x these figures. Every business is different, which is why the Playbook consultation exists.

Sources: Bureau of Labor Statistics (HVAC wage data, 2024), Upwork Research Institute (40% AI productivity gain, 2024), Timefold / Salesforce (25-35% drive time reduction via AI routing), ArtsMART / BCG (10%+ revenue lift from AI training).

MERCANTILE

Ready to see what AI can do for your business?

This is a lot to take on alone. That's why Mercantile exists.
Book a call and I'll show you exactly what to automate,
what it saves you, and how we handle everything.

<https://workwithmerc.as.me>

tap to book your call

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