

SAMPLE FIRST MOVE

Automation Map

Example, built from a fictional job posting so you can see the shape. Yours is built from your real posting, one page, free, delivered before any call.

The posting: Operations Coordinator at a 40-person field-services company. Duties include weekly pipeline reporting, booking confirmations and reminders, keeping the CRM and accounting in step, chasing job updates from crews, routing inbound quote requests, monthly vendor reviews, and covering the front desk at peak times.

Software can do this

- Assemble the Monday pipeline report from the CRM and the job software
- Send booking confirmations and reminder messages
- Copy new jobs from the CRM into accounting, and invoice status back
- Chase missing job updates from crews on a schedule
- Route inbound quote requests to the right estimator, after hours included

A person has to

- Handle an upset customer
- Make the final call on a quote
- Resolve a double-booked crew
- Cover the front desk at peak times

Not worth touching

- Monthly vendor reviews
- Rare one-off data requests

A focused first sprint can connect reporting, reminders and CRM updates. Scope the actual workload and time saved before agreeing the build. The existing automation sprint range is \$1.5K to \$3.5K.

Want yours? Send the posting to hello@qelv.io. The Map comes back within a day or two, and you decide if a conversation is worth it.