

❶ FICTIONAL EXAMPLE

This company does not exist. The report shows what you receive after a Work Scan Compact; all names, numbers and hours are invented and only meant to show the structure.

THE BLUE THING

Work Scan Compact: example report

Jansen Installations: quotes cost an evening every week

Company	Jansen Installations (fictional)
Sector	Installation services: heating, plumbing, electrical
Size	8 employees, 1 of them in the office
Period	August 2026
Work problem	Preparing quotes costs an evening every week; requests sometimes sit for days.

This report is the outcome of a short questionnaire and one 90-minute conversation with the owner. It describes how the quoting work runs today, what it costs, which three improvements deliver the most and what a logical first step would be. It is written so you can act on it yourself, with or without us.

1. How it runs today

Requests arrive by email, the website, WhatsApp and phone, about twelve a week. The office employee retypes the details into the quoting software; in the evening the owner looks up materials and prices, formats the quote and sends it. Follow-up happens when someone remembers.

The conversation showed that three to four requests a week sit for more than three working days, usually because information is missing (address, photos, boiler type) and nobody owns the follow-up. The owner estimates that one in five of those late quotes goes to a competitor.

Where the hours go (per week, estimated in the conversation)

Work	Who	Hours
Reading requests and retyping details	Office	3
Looking up materials and prices	Owner, evenings	4
Formatting and sending the quote	Owner	2
Following up open quotes	Nobody in particular	0 to 1

About 9 hours a week in total, 6 of them the owner's evenings.

At an internal rate of €55 an hour that is over €500 a week, over €20,000 a year. Jobs lost through late quotes come on top and are not included in this figure.

2. Three opportunities for improvement

For each opportunity: what AI does and does not do, what it is expected to deliver and what it needs. The order here is not the priority; that is in the action plan.

Opportunity A: quote requests prepared automatically

Every request from email, website or WhatsApp is read and placed in the quoting software as a draft: customer details, address, requested work and attachments. If something is missing, a short question goes to the customer the same day.

What AI does

Reading, transferring details, classifying the request by job type and asking for missing information.

What AI does not do

Setting prices or judging whether a job is feasible. That stays with the owner.

Expected return

About 3 hours a week in the office. Every request gets a confirmation the same day, weekends included.

What it needs

Access to the mailbox and the WhatsApp number, an integration or import into the quoting software, and a fixed list of the ten most common jobs.

Condition

Requests arrive in one place. Today they are spread over two mailboxes and a private phone.

Opportunity B: standard items per job type

From last year's quotes, a list of standard items is built per job type (boiler replacement, fuse box, bathroom). For a new request the assistant proposes which items belong; the owner ticks, adjusts and sets the price.

What AI does

Extracting patterns from old quotes, proposing matching items and flagging deviations.

What AI does not do

Inventing prices. Every price comes from the company's own price list or the wholesaler.

Expected return

About 2.5 hours a week for the owner, and fewer forgotten items.

What it needs

Last year's quotes as the source, the wholesaler's current price list.

Condition

Needs clean-up first: the old quotes are not built consistently. So not the first step.

Opportunity C: follow-up that does not get forgotten

Five working days after sending without a reply, a personal reminder is ready, and the owner sees in one overview which quotes are open and for how long.

What AI does

Tracking status, preparing the reminder in the company's tone, showing the overview.

What AI does not do

Pressuring customers or offering discounts. The reminder goes out after one click by the owner; automatically after a trial period if desired.

Expected return

Few hours (about 1 a week), but revenue: an estimated one to two extra jobs a month from quotes that would otherwise lapse.

What it needs

Quote status from the quoting software.

Condition

Works best together with opportunity A, because the status is then already tracked.

3. Action plan with priority

The order is based on return, risk and how quickly it works.

1 First: opportunity A, requests prepared automatically

Biggest time saving, lowest risk: no pricing decisions are made and the owner's work does not change, a draft is simply ready. First version for the three most common jobs.

2 Right after: opportunity C, follow-up

Small addition on the same basis, direct revenue gain. Can be part of the first version as soon as the status is available from the quoting software.

3 Later: opportunity B, standard items

Only worthwhile once the old quotes are cleaned up and the first version has run for a few weeks. By then there are also new, consistently built quotes as a source.

What you can do yourself already, without us

- ✓ One email address for all requests, and the WhatsApp number moved to a business number.
- ✓ A list of the ten most common jobs and the minimum you need to know from the customer for each.
- ✓ The last fifty quotes collected in one place, as the source for opportunity B.

4. Next step

If you want the first version (opportunity A with C) built, a separate fixed quote follows. It states exactly what will and will not be built, the schedule and what the result must meet. The amount of this Work Scan is deducted from it in full. You can also use this report to continue on your own or with another party.

- First version: requests from email, website and WhatsApp as drafts in the quoting software, with follow-up questions for missing details and a reminder after five working days.
- Outside the first version: pricing, standard items (opportunity B), integration with the planning.
- Ownership: the solution, the access and the documentation belong to Jansen Installations.

Fictional example report by the blue thing. Company, names and numbers are invented.