

GET YOUR TIME BACK.

Workflow Assessment & Action Plan

North Georgia Comfort Solutions

Fictional company: Locally owned HVAC business with 7 employees: owner, office manager, dispatcher/customer service, and four field technicians.

Workflow assessed: New service request → Scheduling → Technician dispatch → Job completion/notes → Invoice → Customer follow-up → Payment.

THE OWNER'S STATED PROBLEM

"We're getting the work done, but everything takes too much babysitting. My office manager is constantly following up with technicians and customers, and I'm still doing paperwork at night."

Assessment objective

Find where this one recurring workflow is creating avoidable work, identify what can be simplified before buying anything, and give the owner a practical order of operations.

What this sample demonstrates

This sample shows the type of thinking and deliverable a BertoMir workflow assessment can produce. The company, observations, costs, and recommendations are fictional. No savings or results are being claimed.

The current workflow

The business is functioning. The problem is the amount of manual chasing required to keep the work moving.

01 NEW SERVICE REQUEST

Calls, website forms, and emails arrive through different channels. Office staff manually move customer details into the scheduling system. Some requests arrive incomplete.

02 SCHEDULING

The dispatcher checks technician availability and schedules manually. Changes often create phone calls or text messages back and forth.

03 TECHNICIAN DISPATCH

Technicians receive the job, but missing addresses, equipment details, or customer notes can trigger calls back to the office.

04 JOB COMPLETION / NOTES

Technicians record job notes inconsistently. Some are complete, some are brief, and additional details may arrive later by text.

05 INVOICE

Office staff review the job information, fill gaps, and prepare the invoice. Missing details create another round of follow-up.

06 CUSTOMER FOLLOW-UP

Estimates, approvals, maintenance reminders, and callbacks depend partly on manual lists and memory.

07 PAYMENT

Most customers pay normally. Outstanding invoices require manual checking and follow-up.

Pattern

No single step is catastrophic. The wasted time comes from repeated interruptions, incomplete handoffs, and follow-up work spread across the entire workflow.

Four root problems

The visible symptoms are texts, callbacks, incomplete notes, and after-hours paperwork. The underlying problems are more useful to fix.

1. Information is captured more than once

Customer details enter through different channels and then get manually moved into another system. That creates extra work and more opportunities for mistakes.

2. Office-to-field handoffs are inconsistent

Missing information creates calls and texts going out to technicians. Incomplete job notes create the same problem coming back to the office.

3. Follow-up depends too much on memory

Estimates, approvals, unpaid invoices, maintenance reminders, and callbacks should not rely primarily on somebody remembering the next action.

4. People are compensating for the workflow

The office manager spends time chasing information because the process does not reliably capture what is needed at the point where the information is created.

Assessment conclusion

The first opportunity is not a new AI product. It is better input quality and cleaner handoffs. Automation becomes useful only after those basics are reliable.

PRIORITY 1

DO NOW

Fix the inputs before adding more technology.

Standardize new-service intake

What we observed: Requests arrive by phone, web form, and email, and the office manually reconstructs the information needed to schedule the job.

Why it matters: Every missing detail creates another interruption later. The same information may be typed more than once.

What should change: Create one required intake checklist for every channel. Capture customer name, service address, contact method, problem description, equipment information when known, access notes, and preferred appointment window before the request is considered ready for scheduling.

First step: Write the required fields on one page and test them against the last 10 service requests.

Likely effort / cost: Low. Primarily staff time. No new software required for the first version.

Standardize technician completion notes

What we observed: Job notes vary by technician, and missing information is sometimes supplied later by phone or text.

Why it matters: Incomplete notes slow invoicing, weaken follow-up, and force office staff to chase information after the technician has moved to another job.

What should change: Use a short completion checklist that requires work performed, parts/materials, customer decision, recommended next action, photos when relevant, and invoice-ready status.

First step: Define the minimum completion standard and pilot it with one technician for one week.

Likely effort / cost: Low. Process change first. Existing field-service software may already support required fields.

PRIORITY 2

DO NEXT

Automate the predictable follow-up after the process is clean.

Use existing automation for routine messages

What we observed: Appointment confirmations, reminders, completed-job follow-up, estimate reminders, and some internal notifications are handled manually.

Why it matters: These messages are predictable and repeatable. Staff attention is better spent on exceptions and customers who actually need judgment.

What should change: Check the current scheduling/CRM platform for built-in confirmation, reminder, follow-up, and notification features before purchasing another tool.

First step: Inventory the automation features already included in the current subscription and turn on one low-risk workflow first, such as appointment reminders.

Likely effort / cost: Low to moderate. Often included in existing software. Any third-party messaging cost should be confirmed before activation.

Guardrail

Automate routine communication, not customer judgment. A reminder can be automated. A complicated complaint, unusual estimate, or sensitive customer conversation should still go to a person.

Success check

After 30 days, compare how many manual reminder/follow-up touches the office is still making and whether technicians are supplying complete job information without being chased.

DO LATER

Integrate systems only when the time savings justify the work.

Connect website intake to scheduling / CRM

What we observed: Website service requests are manually transferred into the system used by the office.

Why it matters: Direct intake could remove duplicate entry, but integration work is wasted if the intake fields and internal process are still changing.

What should change: Once the standardized intake has been used successfully, evaluate whether website submissions can create a clean lead/service-request record automatically.

First step: Measure how many website requests arrive in a normal month and how many minutes are spent re-entering each one. Use that real number to judge whether integration is worth paying for.

Likely effort / cost: Moderate and highly tool-dependent. Could be a built-in connector, a low-cost automation service, or custom work. Get an exact quote only after the current software is confirmed.

When this becomes worth doing

Move this forward when the intake process is stable, website volume is meaningful, and the manual transfer is consuming enough recurring time to justify implementation and maintenance.

When to leave it alone

If the website produces only a handful of requests each month and manual entry takes a minute or two, the integration may cost more in attention than it saves.

DON'T BOTHER

Standalone AI chatbot, for now.

Why it sounds attractive

A chatbot could answer common questions, collect information after hours, and make the company appear more automated.

Why it is not the current priority

The observed bottlenecks are incomplete intake, inconsistent technician notes, manual handoffs, and routine follow-up. A chatbot does not fix those problems. It may simply create another source of incoming information for the office to manage.

What would change the decision

Revisit the idea only after the core workflow is stable and there is evidence that a meaningful volume of repetitive customer questions or after-hours inquiries is consuming staff time.

The principle

Technology is a tool, not the product. If a process change gives the business more time back than a new subscription, make the process change.

Also not recommended right now

Replacing the entire scheduling/CRM platform solely to solve these issues. First test the features already being paid for and fix the information standards. A platform migration should require a stronger business case.

YOUR NEXT STEPS

A practical order of operations

The company can use this plan with BertoMir, another provider, or its own team.

THIS WEEK	Define the intake checklist. Review 10 recent service requests and identify the minimum information needed before scheduling.
THIS WEEK	Define technician completion standards. Agree on the minimum notes required before a job is considered invoice-ready.
NEXT 2 WEEKS	Pilot both standards. Use them in real work. Adjust only when a field is genuinely useful.
NEXT 30 DAYS	Turn on one existing automation. Start with a routine message such as appointment reminders and watch for exceptions.
AFTER 30 DAYS	Measure before buying. Count manual follow-ups, incomplete handoffs, and website re-entry time. Use the evidence to decide whether integration deserves investment.

THE PLAN AT A GLANCE

DO NOW	DO NEXT	DO LATER	DON'T BOTHER
Standardize intake and technician completion notes.	Automate routine confirmations, reminders, and follow-up using existing tools first.	Evaluate website-to-scheduling integration after measuring the real time cost.	Standalone AI chatbot and full platform replacement, for now.

Bottom line

North Georgia Comfort Solutions does not need more technology first. It needs cleaner information, better handoffs, and less reliance on memory. Fix those basics, automate the predictable work, then decide whether integration is worth the investment.

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This document is a fictional demonstration of the BertoMir workflow-assessment approach. It is not a claim of work performed for an actual company.