PRO-AI-AGENT

TO GROW YOUR BUSINESS WITH INTELLIGENT SOLUTIONS | IT & AI SERVICES

AI agent deployment action plan

🔧 Trades & Contractors

Plumbers, electricians, renovators, landscapers: you're on the job site, the AI agent runs the office. It answers clients, prepares quotes and tracks invoices.

The challenges we address

- Missed calls while on the job
- Quotes written at night after a full workday
- Late invoices and payments

Overview

1	**Days 1-30**	**Foundations & quick wins**	Zero lost client requests
2	**Days 31-60**	**Core business automations**	15 to 25% higher quote acceptance
3	**Days 61-90**	**Integrations & optimization**	30 to 50% faster payments
4	**Months 4-6**	**Scale & intelligence**	Recurring revenue from maintenance contracts
5	**Months 7-12**	**Autonomy & growth**	More time on site, less in the office

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DAYS 1-30

Foundations & quick wins

Goal : Set up a secure infrastructure, connect the agent to your messaging tools, train your team and deliver the first high-impact automations.

⚙ Common foundation

- **Kick-off workshop & process audit** — Mapping of your repetitive tasks, identification of quick wins and prioritization with your PRO-AI-AGENT project manager.
- **Dedicated VPS creation, deployment & configuration** — Private server sizing, hosting region selection, domain name, automatic backups and monitoring. Your data stays yours.
- **Ubuntu system security hardening** — Non-root user, key-only SSH access, firewall, brute-force attack protection, automatic security updates and log monitoring.
- **AI agent harness installation & configuration** — Setup of the agent's runtime environment, skills, permissions and action logging.
- **Connection to the LLM of your choice** — OpenAI, Anthropic, Google Gemini, Alibaba (Qwen) or lower-cost Chinese LLMs: secured API keys, spending caps and a fallback model.
- **Agent connection to your messaging apps** — Telegram, WhatsApp, Signal, email or others: you talk to your agent like a colleague, right from your phone.
- **Agent memory setup** — Specialized or open-source tools depending on your budget and the project manager's recommendations: long-term memory, company knowledge base, documents and procedures.
- **Team training** — Getting started with the tools, how to phrase a request, delegate a task, approve an action, plus security best practices to start automating daily work.

🔧 Industry automations

- **24/7 client request intake** — Job type, address, photos and urgency collected automatically.
- **Voice-to-quote** — Dictate measurements and materials on site, the agent produces the quote.
- **Estimate appointment booking** — Slots proposed based on your calendar and travel.

🎯 **Target outcome :** Zero lost client requests

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DAYS 31-60

Core business automations

Goal : Automate the most time-consuming daily processes of your business and anchor new habits within the team.

⚙ **Common foundation**

- **Bi-weekly performance review** — Conversation analysis, instruction tuning and enrichment of the agent's memory.
- **Advanced training** — The team learns to create routines and scheduled tasks on its own, no technical skills needed.
- **LLM cost tracking** — Usage report and budget alerts to keep spending under control.

🔧 **Industry automations**

- **Pending quote follow-up** — Automatic follow-up to increase acceptance rate.
- **Invoicing & payment reminders** — Invoices generated at job completion with automatic reminders.
- **Material orders** — Material lists and price requests to suppliers.
- **Crew & job scheduling** — Who goes where, when, with what equipment.

🎯 **Target outcome :** 15 to 25% higher quote acceptance

3

DAYS 61-90

Integrations & optimization

Goal : Connect the agent to your business software, make end-to-end workflows reliable and measure the first return on investment.

⚙ **Common foundation**

- **Quarterly security audit** — System patches, API key rotation, backup restore test.
- **Model selection optimization** — Smart routing between premium and low-cost models depending on each task's complexity.
- **90-day ROI review** — Hours saved, revenue generated and priorities for the next semester.

🔧 **Industry automations**

- **Accounting software integration** — Invoices and expenses synced with your books.
- **Job reports with photos** — Progress reports sent to clients after each stage.
- **Google reviews & referrals** — Automatic review request after each successful job.

🎯 **Target outcome :** 30 to 50% faster payments

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MONTHS 4-6

Scale & intelligence

Goal : Move from task automation to intelligent management: specialized agents, forecasting, dashboards and compliance.

⚙ Common foundation

- **Multi-agent architecture** — Specialized agents (sales, operations, admin) coordinated by a main agent.
- **Compliance & data protection** — Data policy review (Quebec Law 25, PIPEDA, GDPR depending on your market), access logs and consents.
- **Power-user training** — Your internal champions become autonomous in evolving the automations.

🔧 Industry automations

- **Recurring maintenance contracts** — Seasonal reminders and scheduled maintenance visits.
- **Per-job profitability tracking** — Hours, materials and actual vs quoted margin.
- **Compliance & permits** — License, insurance and permit renewal reminders.

🎯 **Target outcome :** Recurring revenue from maintenance contracts

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MONTHS 7-12

Autonomy & growth

Goal : Turn AI into a lasting growth lever: new revenue streams, replicating the model and a year-2 roadmap.

⚙ Common foundation

- **Annual ROI & KPI review** — Full measurement of time savings, revenue and service quality over 12 months.
- **Full security audit & upgrade** — Infrastructure review, server and model upgrades to the latest generations.
- **Year-2 roadmap** — New automations, new channels and growth targets defined with your project manager.

🔧 Industry automations

- **Photo-assisted estimating** — Pre-estimates from client-submitted photos.
- **Team growth** — Hiring and onboarding new employees or subcontractors.
- **Year-2 roadmap** — New services and new territories.

🎯 **Target outcome :** More time on site, less in the office

Ready to launch your action plan?

Get a personalized plan and a free quote within 24 hours.

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Target outcomes are indicative goals; they are adjusted during the initial audit according to your situation. The plan is customized by your PRO-AI-AGENT project manager.