

10 AUTOMATION MOVES THAT SAVE 40 HOURS A WEEK

A practical checklist for managing multiple crews and full schedules.

80% of service businesses are booked or operating near capacity. For many, the challenge isn't finding work—it's staying on schedule without slowing down the work.

High-performing businesses solve this by building automation into everyday workflows. Instead of chasing every task manually, their systems keep work moving.

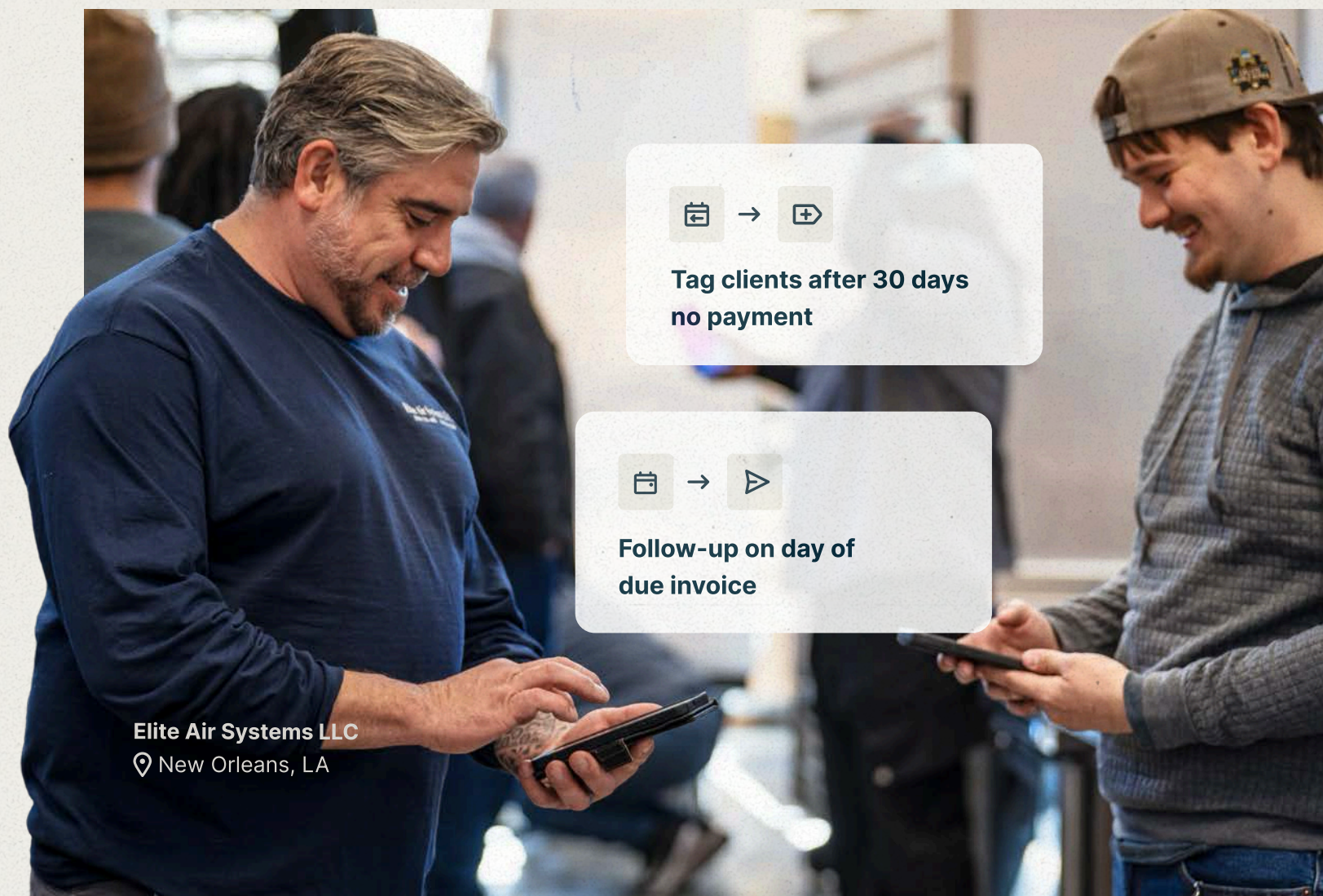
Take it from **Cory Byron**, owner of Vancity Electric. **He grew from \$500K to \$1.4M in revenue** and improved gross margin from 20% to 50% after putting repeatable systems in place.

"Systems are probably the most important thing I've built into my business—removing that sort of daily chaos."

Here are **10 automations** successful service businesses use to keep work moving, reclaim time, and protect margins.

PRO TIP

Start by automating the task that slows your team down the most, like missed calls, quote follow-ups, or unpaid invoices. Once that's fixed, expand automation into the rest of your workflow.



**MASTERS
OF HOME
SERVICE**

Elite Air Systems LLC
New Orleans, LA

1 **Capture Leads 24/7**

Missed calls often mean missed opportunities. When demand is high and crews are on jobs all day, responding quickly becomes harder.

Leading service businesses ensure every lead is captured immediately, even when no one is available to answer the phone.

Ways to improve your lead intake:

- Capture customer requests online 24/7
- Log customer details automatically
- Auto-respond to incoming SMS messages
- Let callers book quotes or jobs directly
- Answer calls after hours with an AI receptionist

"The AI receptionist is really great after hours. It'll answer, take messages, even book quotes and jobs." - Cory Byron, Vancity Electric

PRO TIP

Jobber Receptionist handles calls, messages, and bookings—so your team can review everything in the morning and step in only when needed.



2 **Reduce Back-and-Forth Scheduling**

Customers often call multiple companies when looking for a service. The easier it is to book with you, the more likely they are to choose you.

Letting customers request service online reduces the back-and-forth of calls and messages, helping you respond faster while cutting down on admin hours.

Ways to make booking easier:

- Add online booking to your website
- Embed a service request form on your homepage
- Route advertising leads from online channel (e.g., Google LSAs, Meta ads) directly into your scheduling system
- Let customers choose service appointment times based on your crew's availability

"Your clients are gonna want to book many different ways, and Jobber gives you lots of options. - Cory Byron, Vancity Electric

PRO TIP

Embed a request form, enable self-scheduling, and send ad leads straight into requests—so everything's in one place and you can focus on qualifying jobs, not manual entry.

3 Keep Quotes Moving Automatically

Quotes are often lost simply because the follow-up never happens. Automation helps keep opportunities moving without relying on reminders or sticky notes and ensures quotes are actioned on.

Ways to improve your quoting process:

- Send automated quote reminder emails or texts
- Trigger reminders when quotes remain unopened
- Track opportunities in a visual sales pipeline
- Automatically flag higher-value jobs for personal outreach

“Jobber automatically follows up on our quotes two times, but Sales Pipeline gives me the ability to also follow up personally after that—and that’s when you really win those jobs.” - Cory Byron, Vancity Electric

4 Build Quotes During the Call

When customers receive a quote quickly, they’re more confident moving forward. Build quotes as you speak with customers so the proposal arrives before the conversation ends.

Ways to speed up quoting:

- Use saved line items for common services
- Build quote templates for repeat work
- Pull supplier pricing into estimates (e.g., [Home Depot](#))
- Attach photos and reviews to strengthen credibility
- Send quotes immediately after estimating the job

“I’m using quote templates and saved line items... and typically I try to get my quote done by the end of the video call.” - Cory Byron, Vancity Electric

PRO TIP

Set up [automatic messages](#) and organize leads in your pipeline with columns like “Texted” or “Needs Call”, so you can focus on high-value projects where a human touch matters most.

SALES PIPELINE

Requests	Quotes	
New requests	Draft	Awaiting response 3
<div>Lewis McKinney [Progress bar] [Calendar icon]</div>	<div>Daniel Messina [Progress bar] \$ 5,200.00 [Calendar icon]</div>	<div>Jasmine Williams [Progress bar] \$ 5,200.00 [Calendar icon] 0d</div>
<div>Vera Lee [Progress bar] [Calendar icon]</div>		<div>Sofia Garcia [Progress bar] \$ 1,200.00 [Calendar icon] 2d</div>
<div>Joe Flores [Progress bar] [Calendar icon] Sept 23 2d</div>		<div>Mateo Alvarez Repaint all interior walls in new office s... \$ 5,200.00 [Calendar icon] Sept 22 3d</div>

PRO TIP

Open saved line items in advance, keep [Jobber quoting](#) on one screen and the call on the other, and build the quote live as you discuss the project—so you can send it before the call ends.

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Keep Job Information in One Place

As teams grow, job details can end up across texts, emails, and spreadsheets. Keeping everything in one system helps crews stay informed and prevents important details from getting lost.

Ways to strengthen your documentation process:

- Store job notes and customer history in one system
- Require photos and documentation on every job
- Keep all customer texts in one thread
- Share estimate recordings or notes with crews

*"I don't write anything down anymore. It's all at my fingertips and easy."
- Cory Byron, Vancity Electric*

PRO TIP

Have your team add quick notes on-site and clean them up at the end of the day. Upload photos or videos, and copy key client emails into [job notes in Jobber](#).

 Submit notes and photo

 Send on-my-way text

 Track Time: 01:45

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Turn Time Tracking Into Job Performance Insight

Manual timesheets make it hard to understand job performance. Automated time tracking gives you visibility into [labor costs](#), helping you price future work accurately and with confidence.

Ways to track labor effectively:

- Turn on location-based timers
- Require clock-ins per job site
- Automatically track labor hours against each job
- Review real-time margin performance weekly

"When I said we went from 20% gross margin up to 50%, a huge part of that is job costing and knowing your numbers." - Cory Byron, Vancity Electric

PRO TIP

Use [Jobber's Reports](#) to check your month-to-date revenue, compare it to last year, and review gross margin per job. Spend 10 minutes every Monday reviewing your numbers and flagging any pricing or profitability issues early.



7 Get Paid Faster Without Chasing Payments

Cash flow delays often come from slow billing and delayed payments. Many businesses today automate invoicing right after the job and accept online payments, shortening the time between finishing work and getting paid.

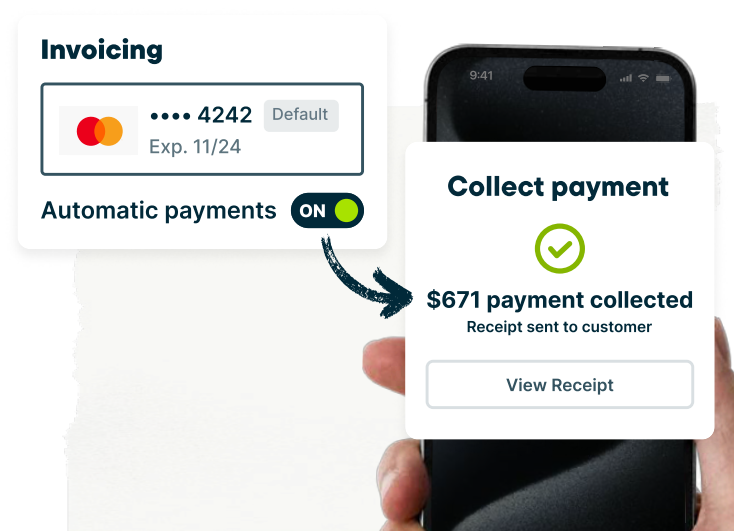
Ways to speed up billing:

- Send invoices immediately after job completion
- Accept credit cards and [ACH payments](#)
- Turn on automated invoice reminders
- Set up automatic payments for recurring work

“When you can accept a credit card payment, guess who’s going to get paid first?” - Cory Byron, Vancity Electric

PRO TIP

With [Jobber Payments](#) turned on, customers can pay as soon as they receive the invoice—reducing delays and manual follow-up.



8 Automate the Customer Journey

As job volume grows, communication multiplies quickly. Automation ensures customers stay informed every step of the way without adding admin overhead.

Common lifecycle automations include:

- Deposit confirmation emails
- Appointment reminders
- Technician-on-the-way notifications
- Job completion follow-ups
- [Review requests](#) after job completion
- Six-month maintenance follow-ups
- One-year warranty reminders
- Promotions for past leads who didn’t book
- Referral rewards

“There’s no way a human could keep up with this level of communication.”- Cory Byron, Vancity Electric

PRO TIP

Map the full customer journey (e.g., from the first lead to repeat service) and automate each stage.

For example: Lead → Quote → Deposit → Job → 6 Months → 1 Year

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Make Performance Visible Without Spreadsheets

Understanding how your business is performing shouldn't require digging through spreadsheets. Strong, automated reporting helps business owners understand performance quickly and make better decisions.

Ways to stay on top of your numbers:

- Review a real-time insights dashboard weekly
- Automatically generate financial reports
- Track leads, jobs, and payments in one place
- Use AI to highlight trends or opportunities

PRO TIP

Use Jobber's Reports to review month-to-date revenue, compare performance year-over-year, and track lead volume trends. A quick dashboard check helps you spot margin leaks and operational issues early.

*"When you start measuring things, you can make them better."
- Cory Byron, Vancity Electric*

10

Connect the Tools Your Business Already Uses

Most established businesses already rely on several tools—accounting software, payroll systems, marketing platforms, and advertising channels.

The opportunity isn't replacing those tools. It's connecting them together, so information flows seamlessly, and you can build more automated systems.

Ways to connect your systems:

- Sync accounting software (e.g., QuickBooks Online)
- Use automation tools (e.g., [Zapier](#)) for onboarding/welcome emails
- Import advertising leads automatically
- Share estimate recordings with technicians
- Connect fleet tracking to see vehicle locations and dispatch faster

PRO TIP

Use automation to streamline handoffs from the start—trigger onboarding emails, send a welcome guide, and share recorded estimate videos with your techs so everyone has the same context before work begins.

"Having your Google Local Service ads and your Meta ads integrated with Jobber eliminates a ton of data entry."- Cory Byron, Vancity Electric

What This Looks Like in a Real Service Business

For a business doing **\$1M–\$2M per year**, these automations typically remove:

- Missed lead follow-up
- Manual data entry or scheduling
- Quote reminder tracking
- Customer communication drafting
- Review requests

Example for a \$1.3M service business:

10 hours saved per week × \$35/hour
= **\$18,200 per year**

5% improvement in quote conversion
= **\$65,000 additional revenue**

3% improvement in margins
= **\$39,000 protected profit**

Potential annual impact:
\$100,000+



This kind of improvement doesn't come from working longer hours. It comes from building repeatable systems that keep work moving efficiently.

See How These Systems Work Together

While each of these automations saves time on its own, they become even more powerful when they're connected in one system.

Jobber connects requests, scheduling, job details, invoicing, and payments in one system your whole team can use with confidence.

WANT TO SEE HOW THIS WORKS FOR YOUR BUSINESS?

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