

# 10 automation systems that save plumbing companies 10+ hours a week.

Frankie's Plumbing  
San Diego, CA



Tag clients after 30 days no payment



Follow-up 5 days after sent invoice



Follow-up on day of due invoice



Archive quote after 90 days no response



# A practical checklist for managing multiple crews and full schedules

**87% of plumbing businesses** are booked or operating near capacity. For many, the challenge isn't finding work—it's managing the workload without slowing things down.

High-performing plumbing businesses solve this by building automation into everyday workflows so work continues moving without constant follow-ups.

Take it from service pro, Cory Byron. 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 automation systems** successful plumbing businesses use to keep work moving efficiently, 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.



Frankie Galvan  
Frankie's Plumbing  San Diego, CA

# 1. Automatically 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 plumbing businesses ensure every lead is captured immediately, even when no one is available to answer the phone.

“WE DO A LOT OF AUTOMATIONS AROUND LEADS—COLLECTING LEAD DATA FROM FACEBOOK, INSTAGRAM, GOOGLE, FUNNELLING IT INTO JOBBER, AND AUTOMATICALLY NOTIFYING THE TEAM SO SOMEONE CAN CALL THEM RIGHT AWAY.”

- Kristian Protic, 365 Heating, Cooling, and Plumbing

## Ways to improve your lead intake:

- Capture customer requests online 24/7
- Log customer details automatically
- Route the lead to the correct sales rep
- Track lead source automatically (e.g., referral partner, Google)
- Answer calls after hours with Jobber Receptionist
- Auto-respond to incoming SMS messages
- Let callers book quotes or jobs directly

Plumbing Co.

### Select your services

- Leak detection & repair
- Water heater installation
- Pipe repair & replacement

### Select an appointment time

- 9AM - 11AM
- 11AM - 12PM
- 1PM - 3PM
- 3PM - 5PM

Confirm Appointment

## 2. Reduce Back-and-Forth Scheduling

Customers often call multiple plumbing 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.

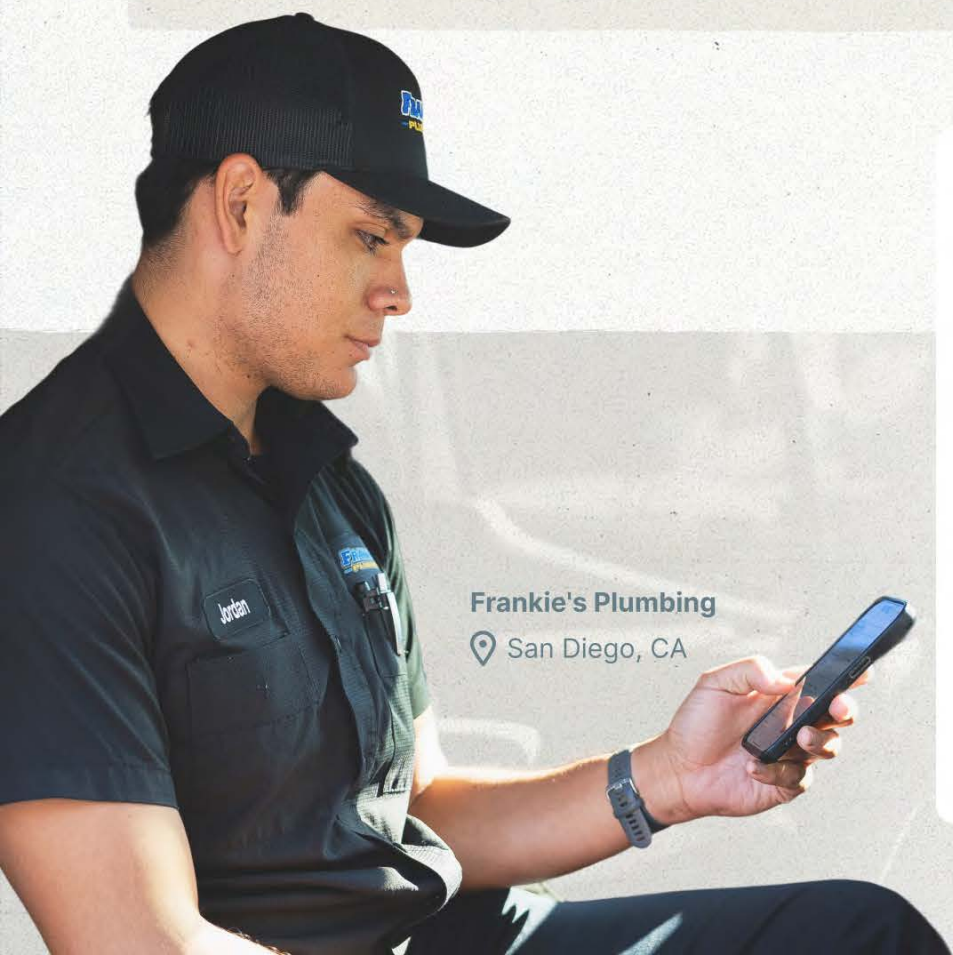
### Ways to make booking easier:

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

→ **Pro Tip:** Embed a request form on your homepage, turn on customer self-scheduling, and send ad leads straight into requests. When everything flows into one place, you can focus on qualifying the job instead of doing manual data entry.

“ONE OF MY BIGGEST THINGS IS MAKING SURE THAT AS SOON AS IT [A REQUEST] COMES IN, IT'S BOOKED AND THEN IT'S ASSIGNED TO THE RIGHT PERSON. ONCE IT'S ASSIGNED TO THE RIGHT PERSON, WE SELL, WE INSTALL, AND WE COLLECT.”

- Kristian Protic, 365 Heating, Cooling, and Plumbing



Frankie's Plumbing  
San Diego, CA

All Requests

Casey Young New

Nathaniel Now

Daniel Me

Vera Lee Assessment complete

Joe Flores Assessment complete

**New Work Request**  
New work request from Casey Young

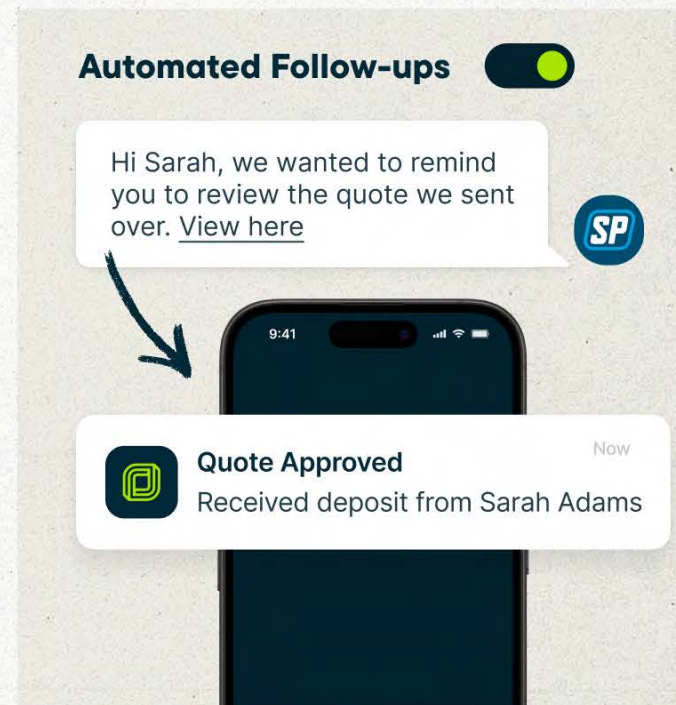
## 3. Keep Quotes Moving Automatically

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

→ **Pro Tip:** Set up automatic messages and organize leads in your pipeline with columns like “Texted” or “Needs Call.” You can personally step in for the larger, high-value projects where a human touch matters most.



## 4. Build Quotes During the Call

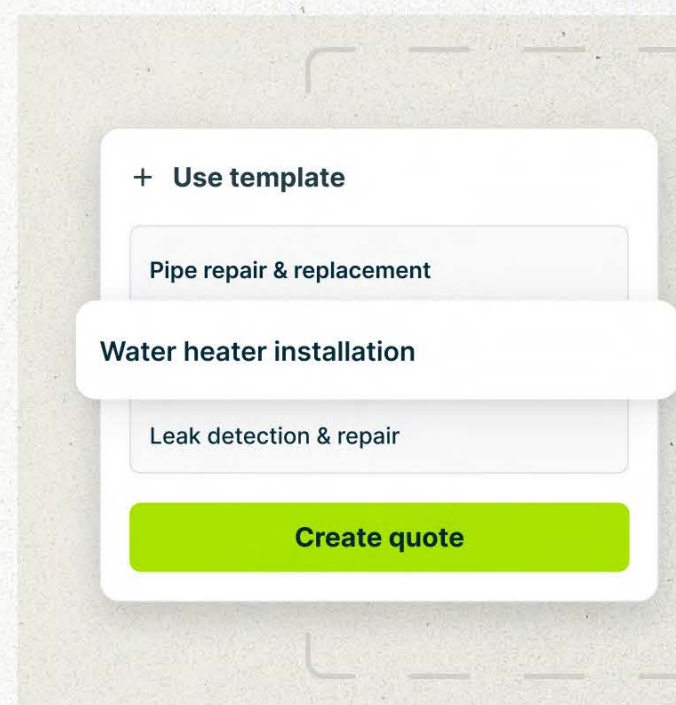
When customers receive a quote quickly, they're more confident moving forward.

Many plumbing companies build quotes while speaking with the customer, so the proposal is ready to send as soon as the job is diagnosed.

### Ways to speed up quoting:

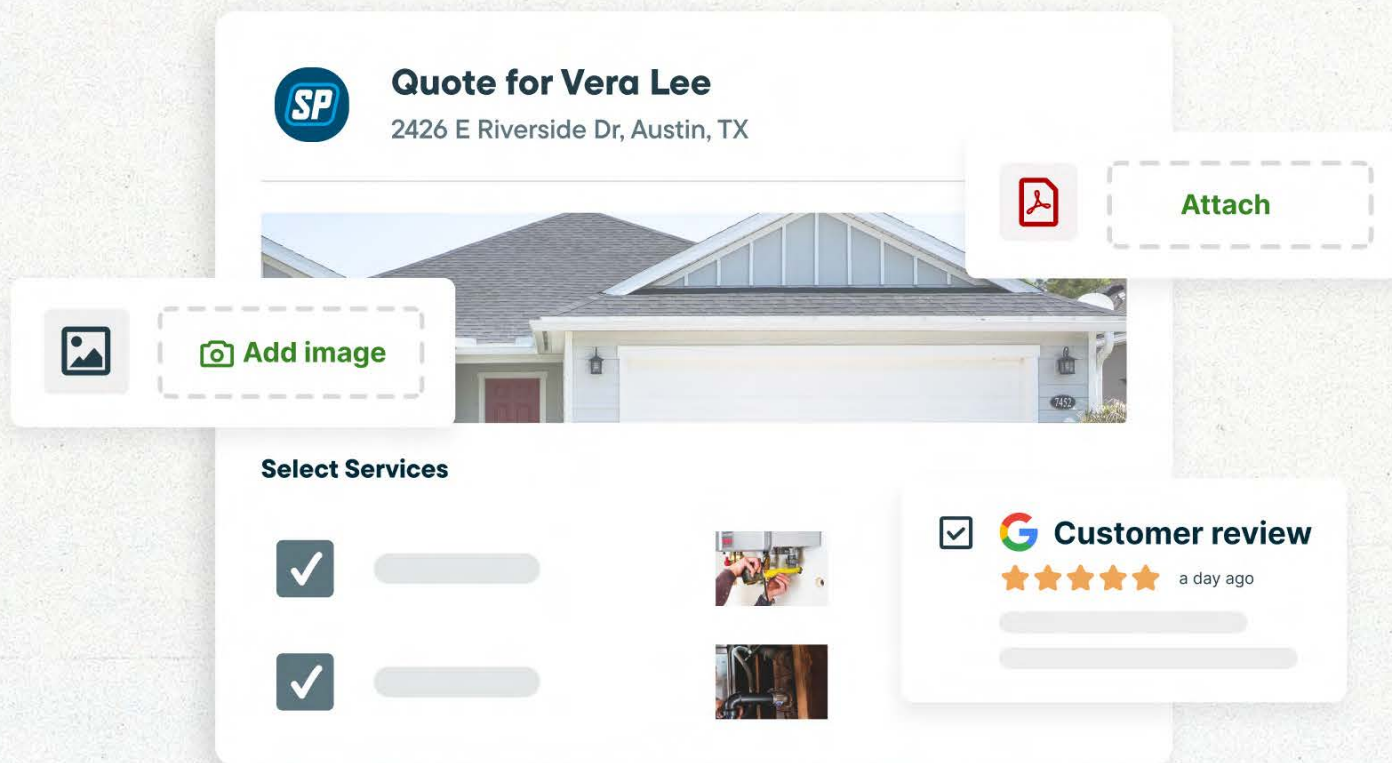
- Use saved line items for common services
- Build quote templates for repeat work
- Pull supplier pricing into estimates (e.g., Home Depot)
- Attach photos and reviews to strengthen credibility
- Offer good, better, best options customers can select themselves
- Send quotes immediately after diagnosing the job

→ **Pro Tip:** Open your saved line items in advance, keep Jobber quoting on one screen and the video call on the other, and build the quote live as you discuss the plumbing job—so you can send it before the call ends.



“ I'M A BIG FAN OF THE QUOTING FEATURE INSIDE OF JOBBER. I LOVE THAT YOU CAN ADD PDFS AND PHOTOS OF THE DIFFERENT LINE ITEMS, AND ADD OPTIONAL LINE ITEMS... CLIENTS SEE THAT, AND MOST OF THE TIME, THEY JUST CLICK YES AND THEY ACCEPT IT.”

- Kristian Protic, 365 Heating, Cooling, and Plumbing



## 5. 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 messages in one thread
- Share estimate recordings or notes with crews

→ **Pro Tip:** Have your team add quick notes right on-site and clean them up at the end of the day. They can also upload client photos or videos, and copy any important emails into the job notes in Jobber.

# 6. 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.

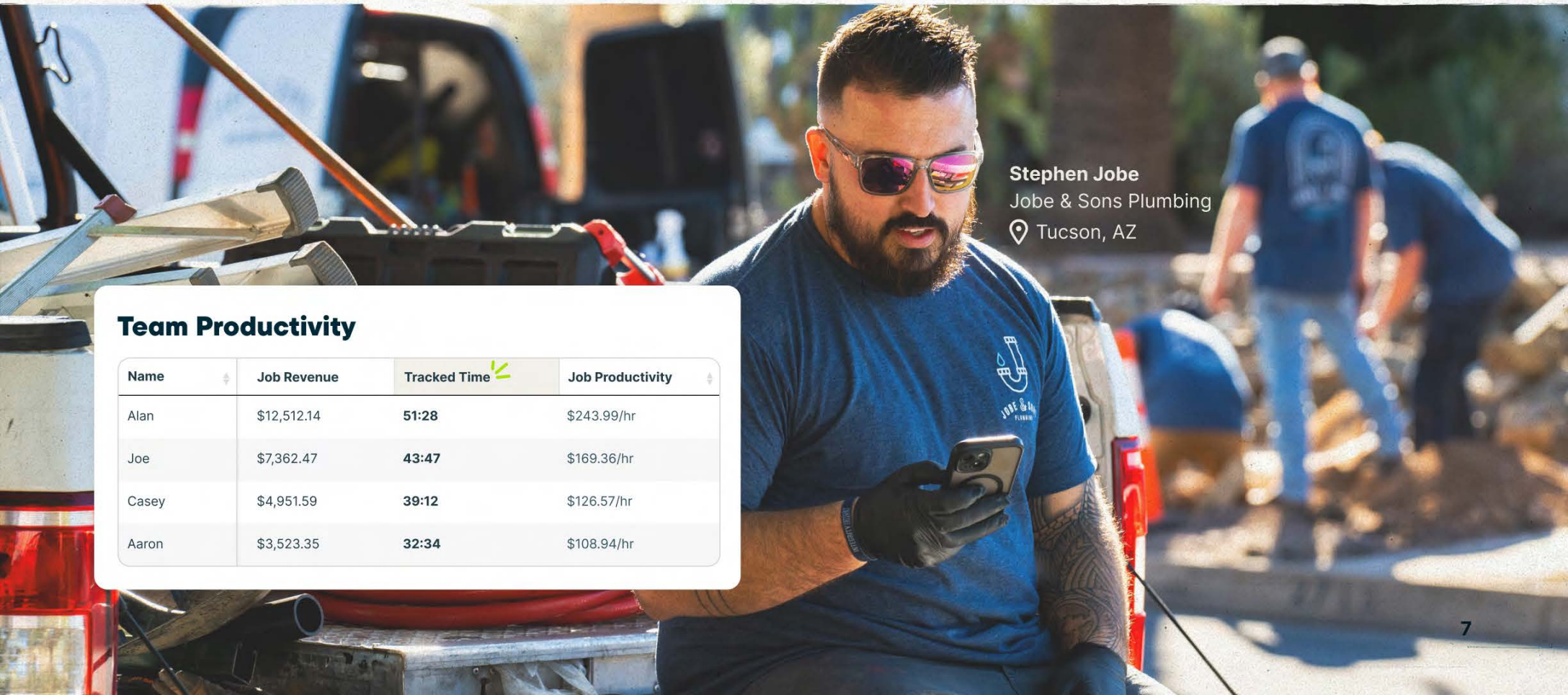
## Ways to track labor effectively:

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

→ **Pro Tip:** Use Jobber's Reports to check your month-to-date revenue, compare it to the same time last year, and review your gross margin per job. Set aside 10 minutes every Monday to review your numbers and flag any pricing or profitability issues before they turn into bigger problems.

“IT'S REALLY EASY TO TRACK MY LABOR. I CAN EASILY GO IN, I CAN SEE EXACTLY HOW MANY HOURS THOSE PEOPLE HAD IF WE'RE GOING BACK ON JOBS, THE HOURS RIGHT IN THERE. IT MAKES IT REALLY EASY TO FIGURE OUT WAS THAT PROFITABLE? WAS THAT NOT PROFITABLE?”

- Megan Schumann, Top Tier Plumber



**Stephen Jobe**  
Jobe & Sons Plumbing  
Tucson, AZ

Team Productivity			
Name	Job Revenue	Tracked Time	Job Productivity
Alan	\$12,512.14	51:28	\$243.99/hr
Joe	\$7,362.47	43:47	\$169.36/hr
Casey	\$4,951.59	39:12	\$126.57/hr
Aaron	\$3,523.35	32:34	\$108.94/hr

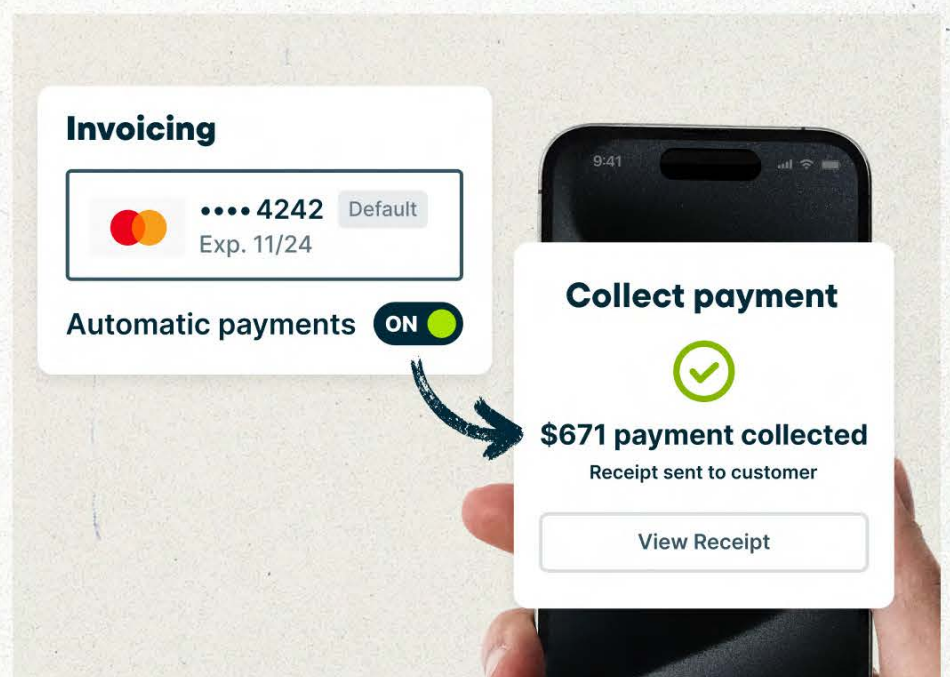
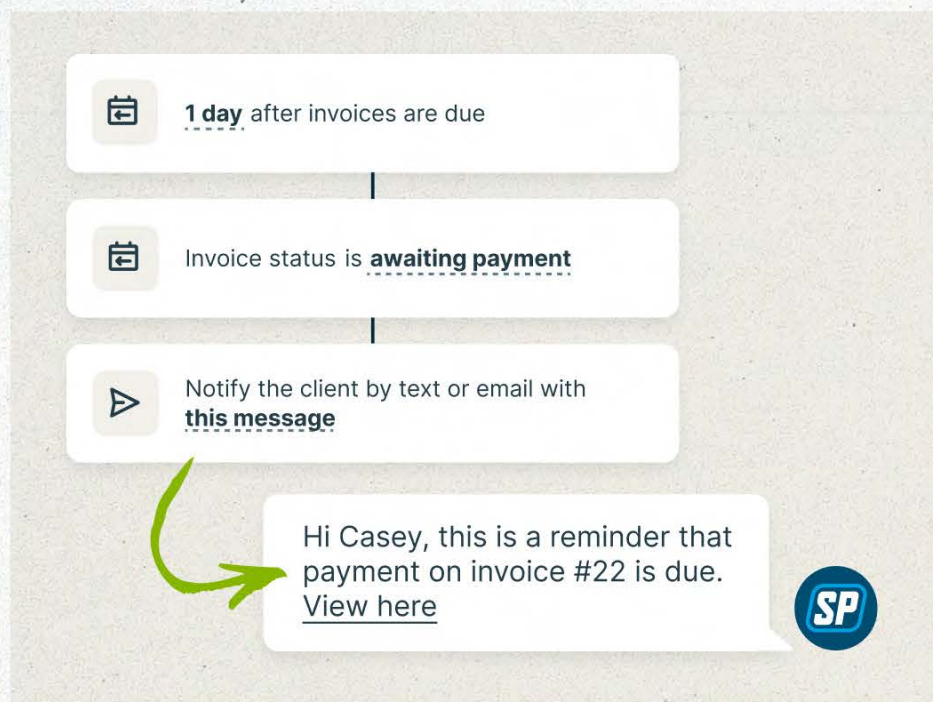
# 7. Get Paid Faster Without Chasing Payments

Cash flow delays often come from slow billing and delayed payments. Many plumbing 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

→ **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 reminders
- One-year warranty reminders
- Promotions for past leads who didn't book
- Referral rewards

→ **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**


As your plumbing business grows, automation ensures every job moves through the system quickly and consistently.

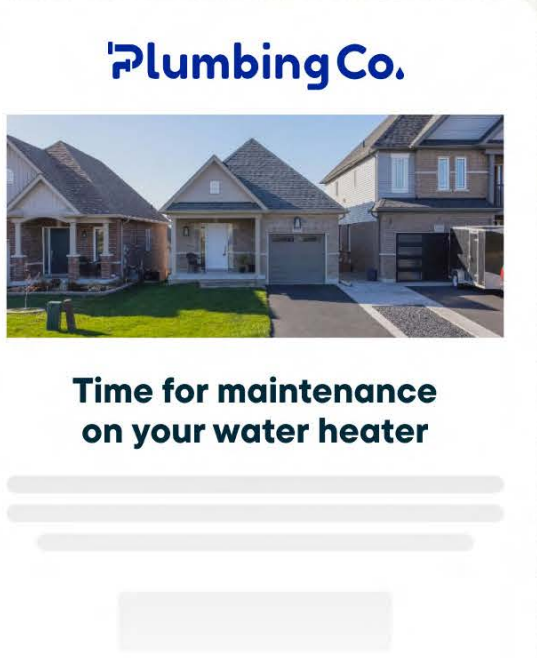
“IF THEY DON'T BUY FROM US TODAY, THEY MIGHT BUY FROM US IN A FEW MONTHS. SO JUST STAYING TOP OF MIND, TOP OF THEIR INBOX, TOP OF THEIR MESSAGE BOX ON THEIR PHONE, I THINK IS SUPER IMPORTANT.”

- Kristian Protic, 365 Heating, Cooling, and Plumbing

### Send to recipients:

 **6 months** after a job ends

 and only if job includes **'Water heater'**



# 9. 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:

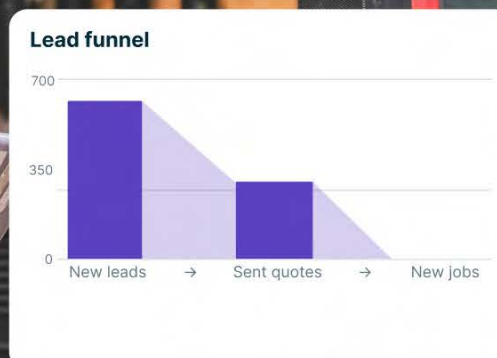
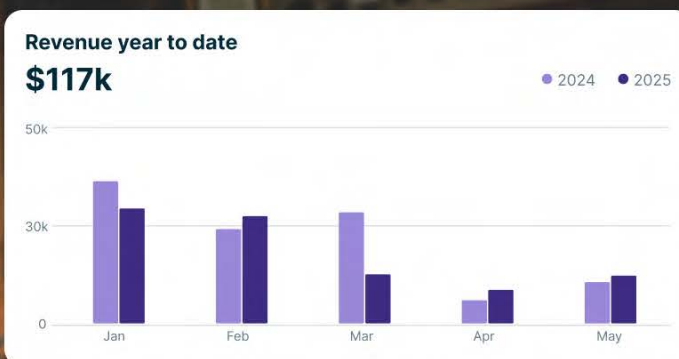
- Review a real-time insights dashboard weekly
- Automatically generate financial reports
- Track leads, jobs, and payments in one place
- Use AI to highlight trends or opportunities

→ **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.

“ WITH THE WAY JOBBER INTEGRATES, NOT ONLY WITH QUICKBOOKS BUT A LOT OF OTHER THINGS, WE CAN TAKE THAT DATA AND WE CAN REALLY GET A GOOD IDEA OF WHAT'S GOING ON IN THE BUSINESS.”

- Paul Maskill, Blue Collar Business Advisors

Mary-Anne Bowcott  
Westcom Plumbing and Gas  
Sooke, BC



# 10. Connect the Tools Your Plumbing Business Already Uses

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

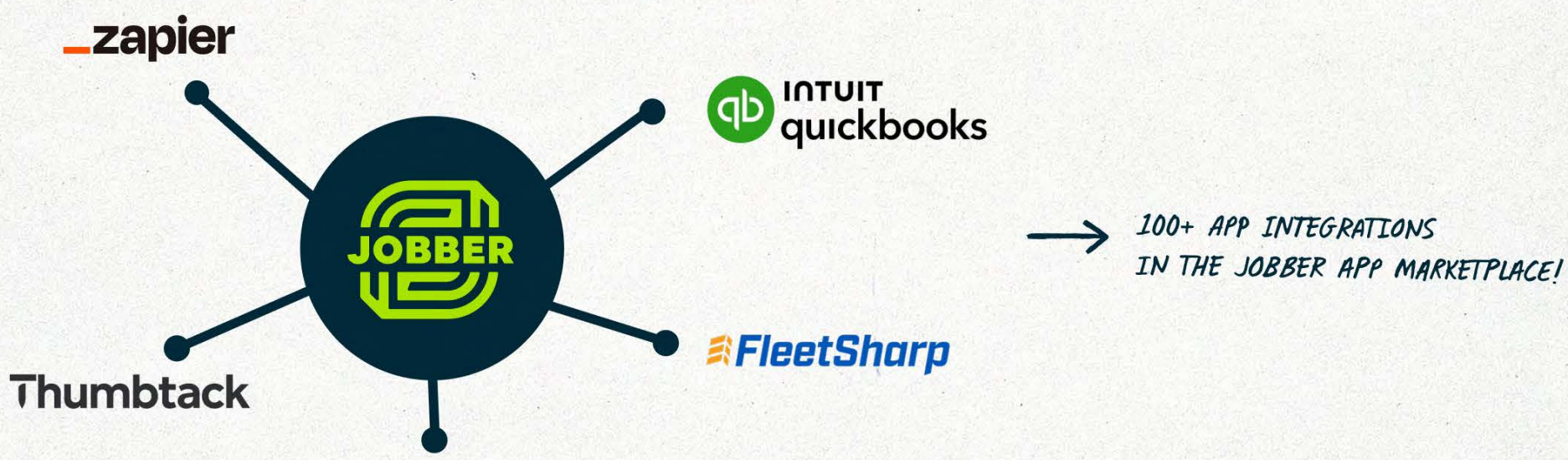
The opportunity isn't replacing those tools. It's connecting them together, so information flows seamlessly, and you can build more automated systems.

“SOMETHING LIKE A FACEBOOK LEAD COMES IN, INSTEAD OF TAKING THAT CUSTOMER DATA AND MANUALLY ENTERING IT INTO JOBBER, I CAN JUST PUT IT ALL THROUGH ZAPIER.”

- Kristian Protic, 365 Heating, Cooling, and Plumbing

## 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



# What This Looks Like in a Real Plumbing Business

For a plumbing 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
- Payment chasing
- Review requests

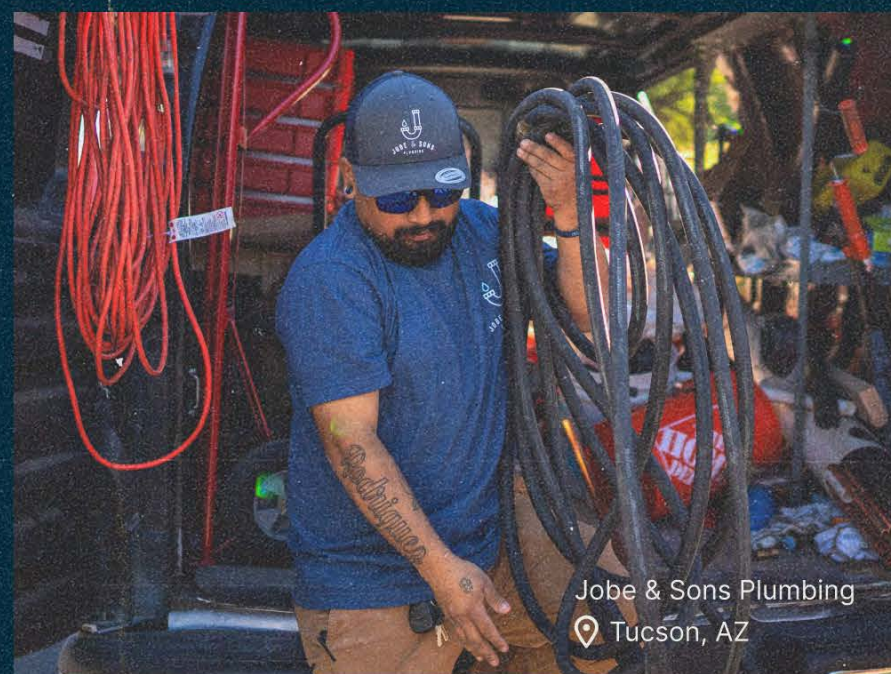
## Example for a \$1.3M plumbing business:

10 hours saved per week in admin work  
= **\$18,200/year in recovered labor capacity**

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.

**“ANYWHERE WHERE I CAN SAVE SOME TIME WITH A TEDIOUS MENTAL TASK, I'LL AUTOMATE THAT ALL DAY.”**

- Kristian Protic, 365 Heating, Cooling, and Plumbing

## 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 plumbing business?

→ [Start Free Trial](#)

