

FOR CONTRACTORS · OFFICE

# AI Office Workers for Contractors

Set up AI helpers that draft your lead replies, estimate follow-ups, review requests, job confirmations and money log every day, and never send, pay or delete anything on their own. The rules file and the 14 workers we run in our own company.

12 chapters | Rules file included | 14 worker instructions | 19 AI prompts

VISION FLOORING

Vision Flooring LLC · Everett, Washington
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# What's inside

Read chapters 1 to 5 first, and never skip Chapter 4. Then set up the five workers in Chapter 6 in **practice mode** and follow the 30–day plan in Chapter 12. The **starter pack** has every file ready to fill in, and the 19 AI prompts are in it as a text file too.


**01** **What an AI office worker is**
Draft, list, remind: you send. Our fourteen workers

**02** **What you need before you start**
The app, the connections, one folder and an hour a week

**03** **The rules file**
The one file every worker reads first, section by section

**04** **The hard rules**
Never send, delete, pay or invent, and why each one exists

**05** **Your facts and your voice**
Business facts, your writing voice and the words to ban

**06** **The first five workers**
Briefing, inbox, new leads, follow–ups and reviews

**07** **More workers when you are ready**
Jobs, money, renewals, subs, numbers and your job software

**08** **Practice mode, reports and logs**
A trial week, a report you can read in a minute, nothing twice

**09** **Talking back to your workers**
Answers, notes, corrections, feedback and away mode

**10** **What workers can't see**
Texts, calls, checks and job software, and how we filled the gaps

**11** **Safety, privacy, cost and backups**
Scam emails, login links, usage limits and the folder you must copy

**12** **Your first 30 days**
Week by week, and how to tell it is working

**T** **Tools**
Setup checklist · Worker instruction template · Weekly check · Sources

# About this guide

This guide was written by Alex Babko, owner of Vision Flooring LLC in Everett, Washington: 20+ years of running a contracting business since 2006, first remodeling and now flooring, with 3,800+ clients behind us. It is not theory. It is how we run our own company today, what we tried and dropped, and what we would do first if we started over, written so you can use it in yours.

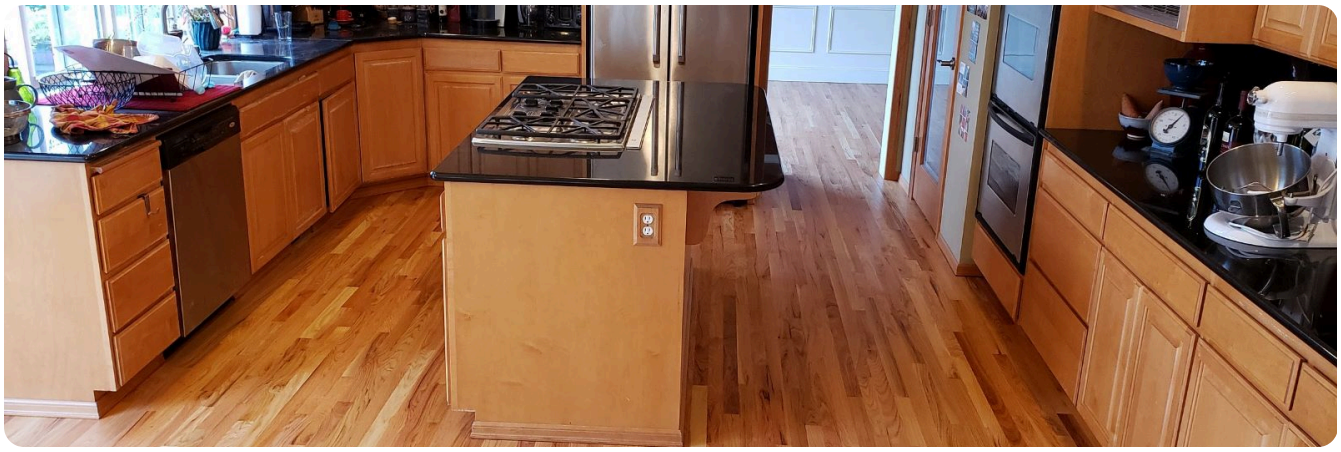
On October 30, 2026 we switched on our own AI office workers: helpers that run on a schedule on our office computer, read the business email, the calendar and our files, and leave drafts, lists and reminders for the owner. The first ten went live that day; six more ran a practice week first. The fourteen in this guide do the office work for the business. They have one rule above every other, in the owner's own words: "Contact the customer manually by text or email. Do not use automatic customer messaging." So they never send anything. This guide is how we set them up, every rule we added after watching them work, and the instructions for all fourteen, minus our private details.

> ⚠ **General business information, not legal, tax or financial advice**
> Laws, platform rules and prices differ by state and change over time. Where this guide touches contracts, lending, taxes, employment or advertising rules, it explains how things usually work and the questions to ask; your attorney, accountant, licensing agency and each platform's current rules come first. Check the sources at the back for the latest versions.

## How to use it

- Read it once start to finish, then work through it in order: each chapter builds on the one before. Every chapter starts with **"The short version"**.
- Boxes marked **AI prompt** are ready to copy into Claude, ChatGPT, Gemini or any other assistant. The same prompts are in the files that came with this guide, so you don't have to retype them.
- Words in [square brackets] are placeholders: replace them with your own facts. Never let a tool fill them in with guesses.

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CHAPTER

# 01

# What an AI office worker is

An AI office worker is a page of written instructions that an AI app runs on a schedule. It reads what you let it read, does one job, and leaves the result where you will see it: a draft in your email, a line in a list, a reminder, a short report. You still talk to every customer. It does the remembering and the first drafts.

**THE SHORT VERSION**

- A worker drafts, lists and reminds. You read, decide and send.
- Each worker has one job, a schedule, and a report it rewrites every run.
- Every worker reads the same rules file first, so one correction fixes all of them.
- Start with five workers in practice mode. Add the rest when you trust what you see.

## Draft, list, remind: you send

Most of the office work in a contracting company is not hard. It is easy to forget. A lead comes in while you are on a job. An estimate goes out and nobody checks back. A happy customer never gets asked for a review. The insurance renews next month and nobody noticed. An AI worker is good at exactly this: looking every day, never getting tired of it, and putting a ready draft in front of you.

| A WORKER DOES | A WORKER NEVER DOES |
|---|---|
| Reads your business email, calendar and the files you give it | Sends, replies, forwards or invites |
| Writes drafts in your voice, ready to send with one tap | Deletes, archives, marks as read or unsubscribes |

| A WORKER DOES | A WORKER NEVER DOES |
|---|---|
| Lists what needs you, most important first | Pays, buys, orders, books, signs or posts |
| Keeps a log so it never drafts the same thing twice | Invents a price, a date, a promise or a fact |
| Reminds you before a deadline, not after | Changes your job software, website or settings |

## Our fourteen workers

These run for our company today. Chapter 6 covers the first five, Chapter 7 the rest, and the starter pack has an instruction file for each one.

| WORKER | WHAT IT LEAVES FOR YOU | WHEN IT RUNS (OURS) |
|---|---|---|
| **Morning briefing** | Today's schedule, what needs you, good news, what's coming | Weekdays 6:43 am |
| **Inbox sorter** | The inbox sorted into "needs you", "reply drafted" and "handled" | Every 30 minutes, Mon–Sat, 6 am–9:30 pm |
| **New-lead responder** | A first reply to each website lead (text and email) and a call-back reminder | 4 times a day, Mon–Sat |
| **Follow-up chaser** | Estimate follow-ups at about 3, 10 and 24 days; invoices with no payment | Mon and Thu 9 am |
| **Review requester** | A thank-you with your review link after each finished job | Fri afternoon |
| **Job prep** | The "we start Monday" confirmation, a prep checklist and a crew text | Every day 5:40 pm |
| **After-job check-in** | "How do the floors look?" with the right care sheet | Mon–Sat 10 am |
| **Material tracker** | Materials ordered, ready or delivered for each job | Mon, Wed, Fri |
| **Bookkeeping helper** | Receipts, bills and payments in one money log; bills due | Fri afternoon |
| **Bills and renewals** | License, insurance, bond and subscriptions, 30 and 7 days ahead | Mon morning |
| **Subs and insurance** | Each subcontractor's state registration and insurance certificate | 1st of the month |
| **Sales scorecard** | Leads, estimates, approvals, close rate and lead sources | Mon 6:32 am |
| **Social media helper** | Checks that the week's posts are scheduled; captions for new photos | Mon late morning |
| **Job software reader** | Open estimates, unpaid invoices and approved jobs, read-only | Mon–Sat about 6 am |

**How we started**

We wrote the rules file first, then switched on ten workers on October 30, 2026. Six more ran a trial week in practice mode, writing everything they would have drafted into their reports instead of the inbox, before we trusted them with real drafts. The same day we added a reader for our job software, because most of our estimates never reach email (Chapter 10). This guide covers the fourteen that do office work for the business; the others do household jobs and are left out.

## Why they never send

It is tempting to let the AI answer customers by itself. We decided against it, and we would decide the same again:

1. **A wrong message can't be unsent.**
   AI is usually right and sometimes confidently wrong: a date you never offered, a scope you never agreed to. In a draft, you catch it. In a sent email, your customer catches it.

2. **Customers buy from a person.**
   Our customers text with the owner. A reply that reads like a robot costs more trust than a reply that comes two hours later.

3. **You stay in control of money.**
   Nothing about prices, discounts, payments or deadlines leaves the office without you reading it.

4. **Automatic messaging has its own rules.**
   Automatic texts and emails bring consent and opt-out rules you would have to follow. A draft you send yourself, one at a time, is simply you writing to your customer.

So every worker in this guide stops one step short: the draft is written, the text is ready to copy, the reminder is on your list. Sending takes you a few seconds, and you read it first.

## What changes when they run

- [ ] A lead that arrives at 10 am has a reply drafted, in your voice, by the next run.
- [ ] Every estimate gets its follow-ups on time, without you keeping a list in your head.
- [ ] Every finished job gets a check-in and, if the customer is happy, a review request.
- [ ] The insurance, the license and the subscriptions show up 30 and 7 days before they are due.
- [ ] Monday starts with one page of numbers: leads, estimates, approvals, where leads came from.
- [ ] You read one short morning briefing instead of digging through the inbox.

AI PROMPT

### Which workers would help my company first?

I run a [trade] contracting company with [number] people. Most of my customer contact is by [text / phone / email]. I use [job software or none] for estimates and invoices, and [email provider] for email.
Here is where my office work slips most often: [for example: slow replies to new leads, no follow-up on estimates, forgetting review requests, bills and renewals, materials].
From this list of office workers, pick the five that would help me most in the first month and explain why in one line each: morning briefing, inbox sorter, new-lead responder, estimate and invoice follow-up, review requester, job start confirmation, after-job check-in, material tracker, bookkeeping log, bills and renewals, subcontractor checks, weekly sales numbers, social media check, job software reader.
Every worker only drafts and lists; it never sends, pays or deletes. Ask me up to three questions first if you need to.

AI PROMPT

### Measure my office week first

Before I set up AI office workers, I want a starting point, so I can tell later whether they helped. Here is my office work for one normal week, one line per task: what I did, about how long it took, and whether a customer was waiting on it.
[paste your list, or describe a typical week]
1. Group the tasks: replying to leads, estimate follow-ups, invoices and payments, scheduling and job prep, reviews, paperwork and renewals, bookkeeping, other.
2. For each group: the minutes per week, and which parts are reading and remembering (a worker can do those) and which are deciding and talking to the customer (I keep those).
3. Name the three groups where a draft or a reminder would save me the most time or the most missed work.
4. Give me five numbers to write down today and check again after 30 days, for example how long a new lead waits for my first answer, and how many estimates got no follow-up.
Use only what I wrote. If something is missing, ask me instead of guessing.

CHAPTER

# 02

# What you need before you start

You don’t need a programmer or new software. You need an AI app that can run tasks on a schedule, a connection to your business email and calendar, one folder on your computer, and about an hour a week to read what your workers leave you.

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**THE SHORT VERSION**

- An AI app that runs scheduled tasks and can read email, calendar and files, and save drafts.
- A business email and calendar that the workers can read.
- One folder that holds the rules, the settings, the lists, the reports and the logs.
- A computer that is on during the work day, and an hour a week from you.

## The app

We use the Claude desktop app. Its **scheduled tasks** run on our office computer while the app is open, and a run that was missed because the app was closed starts as soon as it opens again. The workers reach Gmail and Google Calendar through the app’s connectors, read and write files in one folder, and use the Claude in Chrome extension to read our job software in the browser.

Other AI apps offer scheduled tasks or agents too, and they change quickly. The method in this guide works with any tool that can do these four things:

| IT MUST BE ABLE TO | WHY |
|---|---|
| **Run a task on a schedule**, without you starting it | A worker that waits for you to remember it is not a worker |
| **Read your business email and calendar** | Leads, estimates, invoices, payments and jobs all show up there |
| **Save an email as a draft** without sending it | Drafts are the whole idea. If the tool can only send, don’t connect it |
| **Read and write files in one folder** | The rules, your lists, the reports and the logs live there |

**Check the plan and its limits**

Scheduled work uses your AI plan's usage, and plans have limits. Check your plan's current limits before you switch on fourteen workers. A worker that runs every 30 minutes uses far more than one that runs once a week, which is why our inbox sorter has a "quick run" rule: when nothing new has arrived, it updates one line and stops (Chapter 6).

## The accounts

- [ ] **A business email account**, separate from your personal one. Connect only the business account to your workers.
- [ ] **Your work calendar**, with jobs and estimate visits on it. Workers read it; Chapter 4 explains why they should not write to it.
- [ ] **Your job software** (estimates, invoices, jobs), if you use one. Workers read the emails it sends, and a reader can look at it directly (Chapter 7).
- [ ] **Two-step verification** on every account the workers touch, and a password manager. A worker never logs in for you.

## The folder

Everything the workers know and write lives in one folder. Ours is called *Claude Workers*. The starter pack has the same structure:

| FILE OR FOLDER | WHAT IT HOLDS | WHO CHANGES IT |
|---|---|---|
| **Worker rules.md** | The rules, your business facts and your writing voice | You |
| **Settings.md** | Practice or live, each worker on or off, and its options | You |
| **Lists** | Customer notes, renewals, materials, subcontractors, paid invoices, review requests | You, and some workers add "found in email" lines |
| **Lists/Owner answers.md** | Your answers to the workers (Chapter 9) | You |
| **Reports** | Each worker's latest report, rewritten every run | The workers |
| **Logs** | What each worker already did, so nothing is drafted twice | The workers |
| **Bookkeeping** | The money log, a spreadsheet file that opens in Excel | The bookkeeping helper adds rows |
| **Task backups** | Copies of every worker's instructions | You, after each change |

### Keep personal things out

The workers read everything in the folder and everything in the accounts you connect. Keep the folder to business. Never put passwords, bank or card numbers, tax ID numbers or employee files in it, and don't connect a personal email account "just to see".

AI PROMPT

### Can my AI app run office workers?

I want to set up AI office workers: written instructions that run on a schedule, read my business email, calendar and one folder of files, and leave drafts and reports for me. They must never send, delete or pay anything.
Answer for the app and plan I am using right now (`[app name and plan]`):
1. Can it run a task on a schedule without me starting it? What happens if my computer or the app is off at that time?
2. Which email and calendar accounts can it connect to? Can it save an email as a draft without sending it?
3. Can it read and write files in a folder on my computer?
4. What usage limits apply to scheduled tasks on my plan?
5. Can I stop a task from sending, deleting or paying, and how?
If you are not sure about an answer, say so and tell me where to check. Do not guess.

AI PROMPT

### Test my connections before the first worker

This is a one-time test of my AI app before I set up office workers. Do only these steps, change nothing else, and tell me after each one whether it worked:
1. Read the file `[folder]`\Worker rules.md and tell me its first heading.
2. Write a file `[folder]`\Reports\Connection test.md with today's date and the time.
3. List the subjects of the three newest emails in my business inbox. Don't open them.
4. List tomorrow's events on my work calendar, titles and times only.
5. Create one email draft addressed to `[your business email]`, subject "Worker test", body "Test draft. Delete me." Don't send it.
6. Tell me which of these tools you can't use, and what I would need to switch on.
I will delete the test draft and the test file myself.

END OF THE FREE SAMPLE

# AI Office Workers for Contractors

You just read a few pages. The complete version has everything below, with every worksheet and the spreadsheet.

- ✓ What an AI office worker is, what it may do (draft, list, remind) and what it never does (send, delete, pay, post)
- ✓ What you need: an AI app that runs scheduled tasks, the email and calendar connections, one folder and an hour a week
- ✓ The rules file every worker reads first, section by section, with the interview prompt that writes yours
- ✓ The twelve hard rules, including the scam rule: an email asking for a payment, a bank change or a code is never answered by a worker
- ✓ Your business facts and your writing voice, with the phrases to ban so drafts sound like you
- ✓ The first five workers: morning briefing, inbox sorter, new-lead responder, follow-up chaser and review requester
- ✓ Nine more: job prep and crew text, after-job check-in, materials, bookkeeping, renewals, subcontractors, the sales scorecard, social media and a read-only job software reader

**Get the full guide →**

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Questions first? Text 425-218-4234; a real person answers.