ROI ROADMAP

A Greensboro Fleet Maintenance Provider

Three automations, priced and sequenced, built from your operation's own numbers.

Prepared from conversations with **the owner/operator, service manager, and office manager**, November 5 to November 19, 2025. Every figure in this report traces to an input your team provided. Sources on page 7.

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ROI ROADMAP · OVERVIEW

Executive summary

This operator keeps commercial fleets running across the Piedmont Triad, mobile mechanics working nights and weekends so trucks never leave the customer's yard, with a back office that still chases invoices, builds estimates, and checks work orders by hand. The service side keeps growing; the office does not. This roadmap is built for that squeeze: take the clerical load off the team so capacity grows without adding heads. Nothing here replaces a person. Hours move from paperwork to customers.

Three automations follow. Each is scoped, priced, and estimated from volumes and rates your team gave us on the discovery and deep-dive calls.

$66,300 counted annual savings, all three automations	**$10,300** total one-time build cost, fixed price	**1.9 months** blended payback period

AUTOMATION	ANNUAL SAVING (COUNTED)	ONE-TIME COST	PAYBACK
1 · **Past-due invoice follow-up:** every aging invoice worked automatically	$14,900	$2,950	2.4 months
2 · **Quote & estimate prep:** customer-ready drafts in minutes, not half-hours	$29,100	$3,600	1.5 months
3 · **Work-order billing audit:** unbilled parts and labor caught before invoicing	$22,300	$3,750	2.0 months
Total	**$66,300**	**$10,300**	**1.9 months**

Savings are counted at 85% of computed value as a conservatism buffer. Every input and its source is listed on page 7; if a number there is wrong, the math moves with it and we reissue the report.

Where to start. Quote and estimate prep first: it is the biggest saving and it lays the work-order and history plumbing the billing audit reuses. Past-due follow-up in parallel; it stands alone and is live inside a week. The billing audit third, riding the same pipeline to catch money you already earned.

AUTOMATION 1 OF 3

Past-due invoice follow-up: every aging invoice worked automatically

TODAY

Roughly 1,320 service invoices go out a month on net-30 terms, and at any point about 320 are past due and worked by hand: pull the aging, decide who to chase, write the email, log the promise, follow up when it slips. At 8 minutes a touch, with a quarter needing second and third touches, that is about $18,300 a year of office time spent asking to be paid for work already done.

$4.77
what chasing one past-due invoice costs today, across emails, statements, and second touches

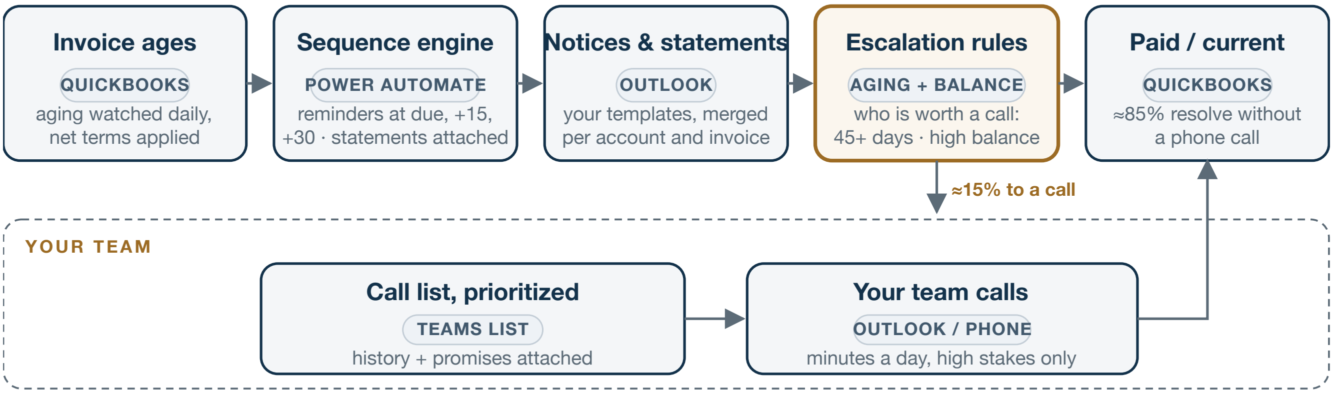
→ $0.20 after

> *"We'll get to collections Friday" is how net-30 quietly becomes net-60.*
> the pattern in most owner-run service companies

THE AUTOMATION

The aging is watched daily. Every past-due invoice enters a tiered sequence on its own: a friendly nudge at due, firmer at 15 and 30 days, statements attached, all from your own templates. Replies and promises land in one place with the history attached. Only accounts worth a phone call, high balance, 45-plus days, or a dispute, reach your team, prioritized with the history attached.

HOW IT WORKS



No AI in this one; plain rules are enough, which makes it the cheapest to run. Every touch is logged.

WHAT IT'S WORTH

Current annual cost (3,840 invoices chased × $4.77)	$18,300
Cost after automation (call list only)	$700
Counted annual saving (85% of computed)	**$14,900**
One-time build $2,950 · Payback	**2.4 months**

AUTOMATION 2 OF 3

Quote & estimate prep: customer-ready drafts in minutes, not half-hours

TODAY

About 300 repair estimates get built a month, each by hand: read the request, pull the unit's history, price the parts, look up labor times, write it up, send it for approval. Call it 25 minutes each, about $45,000 a year of service-writer time.

> *"The estimate is the bottleneck: the truck waits on the paperwork, not the parts."*
> how service writers describe it

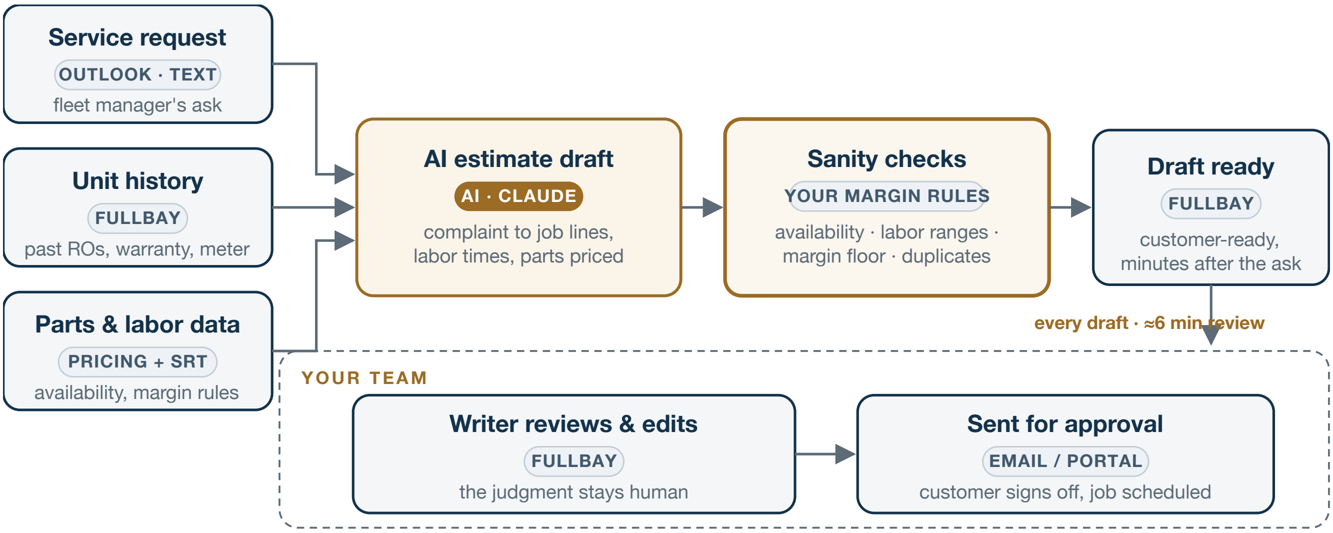
$12.50
what one estimate costs to build today, from request to customer-ready

→ $3.00 after

THE AUTOMATION

A request lands by email or text and a customer-ready draft comes back in minutes: unit history pulled, complaint matched to job lines and labor times, parts priced with availability and your margin rules applied. The writer reviews and sends instead of building from scratch, about 6 minutes instead of 25, and the judgment calls stay exactly where they belong.

HOW IT WORKS



The writer's judgment stays. The assembly work goes.

WHAT IT'S WORTH

Current annual cost (3,600 estimates × $12.50)	$45,000
Cost after automation (review only)	$10,800
Counted annual saving (85% of computed)	**$29,100**
One-time build $3,600 · Payback	**1.5 months**

AUTOMATION 3 OF 3

Work-order billing audit: unbilled parts and labor caught before invoicing

TODAY

Mobile techs close work orders at night and on weekends, and the invoice goes out from whatever the work order says. Parts that never got logged, labor that ran past the estimate, warranty-eligible parts nobody flagged: on manual work orders that leakage typically runs 1 to 3% of parts revenue, and today the office spot-checks maybe one job in five. The other four bill as written.

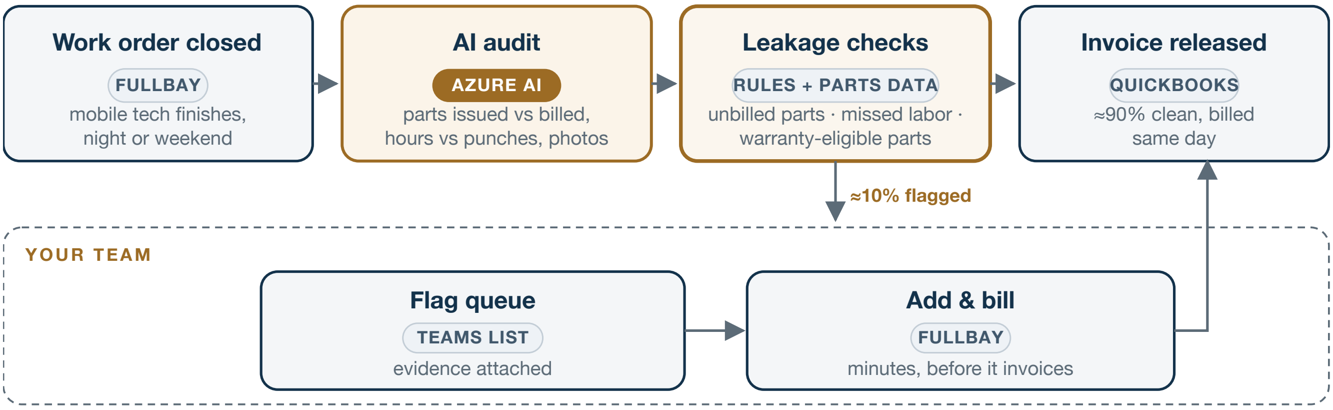
$20,800
unbilled parts and labor recovered per year, at a deliberately low 0.4% of parts revenue

+ $5,500 audit labor

THE AUTOMATION

Every closed work order is audited before the invoice releases: parts issued against parts billed, hours against punches, photos and sign-offs present, warranty-eligible parts flagged. Clean jobs, most of them, bill the same day. The rest land in one queue with the evidence attached, minutes to fix, money you had already earned.

HOW IT WORKS



Money you already earned, caught before the invoice goes out.

WHAT IT'S WORTH

Recovered leakage (0.4% of ≈$5.2M parts revenue)	$20,800
Audit labor today $8,200 → after $2,700	$5,500
Counted annual benefit (85% of computed)	**$22,300**
One-time build $3,750 · Payback	**2.0 months**

ROI ROADMAP · INVESTMENT

What it costs, and two ways to run it

AUTOMATION	ONE-TIME BUILD (FIXED)	MONTHLY, IF RETAINED
1 · Past-due invoice follow-up	$2,950	$95
2 · Quote & estimate prep	$3,600	$310
3 · Work-order billing audit	$3,750	$290
Total	**$10,300**	**$695**

Path A · Build + retainer

$10,300 one-time, then **$695/mo**, month to month.

We monitor every run, fix anything that breaks, absorb vendor and format changes, and improve the automations as your operation shifts. Quarterly review against the numbers in this report. Cancel with 30 days' notice. Running costs are on us: the AI processing and any tooling we add to run your automations are included, so no metered bill or surprise usage charges land on your desk.

First-year net: $47,700

Path B · Build + handoff

$10,300 one-time, plus **$2,400** training.

Two working sessions, one on one with our engineers, a written runbook, and a 60-day support window. We cover the tooling we introduce through training and the support window. After handoff the automations run on your own accounts, and your team owns and runs everything, with no ongoing fees to us.

First-year net: $53,600

There is a third path, and it is a real one: the diagrams and specs in this report are detailed enough for your team or another vendor to build from. If that is the better fit for you, this report is yours either way.

> **You do not pay in full until it works.** 40% to begin. The balance on each automation is due only when it is processing your live volume at the acceptance criteria on page 7. No refund mechanics to argue about, because the money follows the results.

Terms. Pricing valid 30 days from the cover date. · Timeline: 2 to 6 weeks per automation, built in the sequence on page 2. · To move fast, all we need is a look at the systems involved, a few sample documents, and one person to point us in the right direction. That's genuinely it. · Your data stays in your systems; nothing is copied out or used to train anything. · Retainer is month to month, cancel with 30 days' notice. · Handoff path includes a 60-day support window after training.

ROI ROADMAP · ASSUMPTIONS & SOURCES

Every number, and where it came from

Nothing here is an industry benchmark dressed up as your data. Each input below came from your team or from the operating artifacts reviewed during discovery; if one is wrong, tell us and we reissue the report with the math moved accordingly.

INPUT	VALUE	SOURCE
Service invoices issued per month	1,320	Office manager, invoice run-rate and AR aging walkthrough, Nov 19
Past-due invoices worked per month	320	Office manager, collections workflow review, Nov 19
Minutes per follow-up / share needing second touches	8 · 25% at 12	Office manager estimate from live past-due queue, Nov 19
Office / AR loaded hourly rate	$26	Owner/operator, discovery call, Nov 5
Repair estimates built per month	300	Service manager, estimate queue walkthrough, Nov 12
Minutes to build one estimate / to review a draft	25 / 6	Service-writer screen share and timed estimate example, Nov 12
Service-writer loaded hourly rate	$30	Owner/operator, discovery call, Nov 5
Work orders audited per month / spot-checked today	1,320 · 20% at 6 min	Service manager, closed-work-order walkthrough, Nov 12
Unbilled leakage recovered / parts revenue	0.4% of $5.2M	Owner/operator and service manager, parts-sales estimate plus sample closed-RO review, Nov 19
Automation rates used	85% · drafted-for-review · 90%	QCF, set below what comparable builds sustain

Stack shown (Fullbay, QuickBooks, Outlook, Teams; Claude on estimate drafting, Azure AI on the audit) is the current working assumption from the systems walkthrough. We build inside whatever you actually run.

CONSERVATISM

All savings are counted at **85% of computed value**, and the leakage recovery sits under the typical range. Faster collections and faster quotes carry real cash-timing and win-rate benefits we left out entirely. If the report errs, it errs low.

SENSITIVITY

The most load-bearing input is estimate-build time. If it is 15 minutes instead of 25, the quote-prep saving becomes $13,800 and its payback moves to 3.1 months. The automation still recovers its cost in about three months either way.

ACCEPTANCE CRITERIA (SUMMARY)

DELIVERABLE	LIVE VOLUME	PROOF NUMBER
Past-due follow-up	320/mo	95%+ of eligible invoices sequenced within 1 business day.
Quote prep	300/mo	80%+ of drafts usable with minor edits; average review under 8 min.
Billing audit	1,320/mo	85%+ of true exceptions surfaced; 80%+ manager-verified.

The separate terms and conditions document holds exclusions, measurement windows, and support details.