



Dan Mercer | Mercer Marine Services | July 16, 2026

CONFIDENTIAL

AI Tools Assessment

Prepared by **AI Adopters Club** for Mercer Marine Services, Jupiter, Florida

14 to 19

HOURS BACK PER WEEK

5

TOOLS, ALL OFF THE SHELF

\$47,000+

CONSERVATIVE ANNUAL VALUE

After mapping your operations through our AI analysis of your discovery call, we identified opportunities to reclaim 14 to 19 hours per week using 5 specific, off-the-shelf tools. The three quick wins alone return 9+ hours weekly and can be live within 4 days. At your effective rate of \$65 per hour, the conservative annual value is \$47,000 or more.

Where your week is going

Writing estimates and quotes by hand

8 hrs/wk

"Every quote is me, at the kitchen table, after dinner. Two hours a night, easy."

Chasing invoices and double-entering into QuickBooks

4 hrs/wk

"I'm the accounts receivable department. Me and my phone."

Scheduling techs by text message

3 hrs/wk

"If Tony doesn't answer by 7am I'm rebuilding the whole day."

Answering the same customer questions on the phone

3 hrs/wk

"Half my calls are 'is my boat ready' and 'what do you charge for a bottom job.'"

Building the Friday numbers by hand

2 hrs/wk

"I copy everything into a spreadsheet Friday afternoon. It's usually wrong by Monday."

The matrix

Every recommendation, ranked by what it costs you to set up against what it hands back. Start with the highlighted quick wins.

PAIN AREA	CURRENT HRS/WK	TOOL	HRS SAVED/WK	EFFORT	IMPACT	QUICK WIN
Quote and estimate writing	8	Jobber + quote templates	5 to 6	Low	High	QUICK WIN
Invoice chasing	4	QuickBooks payment reminders	2 to 3	Low	High	QUICK WIN
Repeat customer questions	3	Jobber client hub + SMS templates	2	Low	Medium	QUICK WIN
Tech scheduling by text	3	Jobber scheduling + crew app	2	Medium	High	
Friday reporting	2	QuickBooks + Jobber reports	1.5	Medium	Medium	
Email and admin drafting	2	ChatGPT Team workspace	1.5	Low	Medium	

Hours saved are conservative estimates based on the volumes you described on our call, not vendor marketing numbers.

Your prescriptions

Five tools. Each one is off the shelf, proven in businesses your size, and picked against your actual stack, not a wish list. Every number below traces to what you told us or is labeled a conservative estimate.

1. Jobber

5 to 6 hrs/wk back | from \$129/mo

What it kills: kitchen-table quoting, text-message scheduling, and "is my boat ready" calls, in one system built for field service companies.

Setup: easy, 1 to 2 evenings **Replaces:** paper quotes, group texts, callback list

1. Start the 14-day trial at getjobber.com and import your customer list from QuickBooks (built-in sync).
2. Build your five most common quotes as templates: bottom job, detail, engine service, haul-out, monthly wash.
3. Send your next real quote from Jobber and watch the approval come back with a deposit attached.

Gotcha: the QuickBooks sync is one way for some record types. Set Jobber as the system where work starts and let QuickBooks stay the book of record. Do not run both as masters.

2. QuickBooks payment reminders

2 to 3 hrs/wk back | \$0, already in your plan

What it kills: you personally chasing invoices by phone. Automated reminders at day 3, 7, and 14, sent from the system, not from you.

Setup: easy, under 1 hour **Replaces:** the call list on your phone

1. In QuickBooks Online go to Settings, then Account and settings, then Sales, and turn on automatic invoice reminders.
2. Set the schedule to 3, 7, and 14 days past due with the friendly wording we will give you on the review call.
3. Turn on online payments (ACH is 1%) so the reminder email contains a pay button, not a phone number.

Gotcha: reminders only fire for invoices sent from QuickBooks. Your Jobber invoices sync over, but confirm the first two show up before you trust it.

3. Jobber client hub and SMS templates

2 hrs/wk back | included with Jobber

What it kills: half your inbound calls. Customers see job status, quotes, and invoices themselves at a private link, and your five most-typed answers become one-tap templates.

Setup: easy, 1 hour **Replaces:** status callbacks

1. Turn on the client hub in Jobber settings so every customer gets a status link automatically.
2. Write your top five answers once (bottom job pricing, turnaround, storage, haul-out windows, payment options) as saved text templates.
3. Add the hub link to your voicemail greeting and invoice footer.

Gotcha: older customers will still call. The win is the 60% who will happily self-serve, not 100%.

4. Jobber scheduling and crew app

2 hrs/wk back | included with Jobber

What it kills: the 7am text-message rebuild. Techs see their day on their phones, you drag jobs on a calendar, and changes push to them instantly.

Setup: medium, needs a crew huddle **Replaces:** the group text

1. Install the Jobber app on both techs' phones during a 20-minute Monday huddle.
2. Schedule one full week in the calendar view while they watch, so they see where their day comes from.
3. Rule from day one: if it is not in Jobber, it is not a job. No side texts for two weeks.

Gotcha: the first week Tony will still text you. Reply with a screenshot of his Jobber schedule, nothing else. It takes about ten days to stick.

5. ChatGPT Team workspace

1.5 hrs/wk back | \$25/user/mo

What it kills: slow admin writing: customer emails, warranty letters, marina correspondence, job descriptions for your next hire.

Setup: easy, same day **Replaces:** blank-page time

1. Sign up for the Team plan (not the free tier) at chatgpt.com so your business data stays out of model training.
2. Save the three prompt templates we include with this report: customer update, collections nudge, and quote cover note.
3. Draft every non-routine email there first for one week, then edit in your own voice and send.

Gotcha: never paste customer credit card or bank details into any AI tool. Names and job details on the Team plan are fine.

Your 4-day quick start

Everything below is copy-paste actionable and budgeted in minutes. By Friday the three quick wins are live.

DAY 1, TUESDAY

90 minutes

Turn on the money engine

- QuickBooks: switch on payment reminders (3, 7, 14 days)
- QuickBooks: enable ACH online payments
- Start Jobber trial, connect the QuickBooks sync

DAY 2, WEDNESDAY

2 hours

Build your quote library

- Create your five standard quote templates in Jobber
- Import the customer list, spot-check ten records
- Send one real quote from Jobber today

DAY 3, THURSDAY

60 minutes

Let customers serve themselves

- Turn on the Jobber client hub
- Write your five SMS answer templates
- Update voicemail greeting with the hub link

DAY 4, FRIDAY

45 minutes

Draft faster forever

- Set up the ChatGPT Team workspace
- Save the three prompt templates from this report
- Draft Monday's customer updates in 10 minutes flat

ROI in five seconds

Hours reclaimed per week, conservative	14 hrs
Your effective rate, from our call	\$65/hr
Weekly value	\$910
Annual value, 52 weeks, conservative	\$47,320
Annual tool cost, all five	about \$2,400
Return on this assessment	45x, conservative

The realistic scenario, 19 hours at the same rate, is \$64,220 per year. We report the conservative number because that is the one we are willing to stand behind.

OUR GUARANTEE

We stand behind this. If after 30 days of implementing the quick wins and at least two other recommendations you have not reclaimed a minimum of 5 hours per week, tracked however you prefer, reply to this report and we refund the full \$999. No questions, no hassle.

Next steps

Your review call is confirmed for **Tuesday, July 21 at 10:00am**. We'll walk through every line together, and if you want the fast path, we'll talk about what working together looks like.