LANTERN ROOM MARKETING · INTEGRATOR FIRST

A PLAIN-ENGLISH GUIDE FOR CUSTOM INTEGRATORS

The Time Behind *the Technology*

This guide explains where AI agents fit in a small custom integration business, how to begin with three of them, and how to grow into all ten at a pace that suits your business. It was written for owners and teams who have never used AI before.

Inside you will find a plain-English explanation of AI agents, ten agents for the work that surrounds every project, a starter set of three, an advanced section for when you are ready, and a step-by-step plan for your first three weeks with Grok Bot.

THE BIG PICTURE

Marketing brings in the work. Operations decide whether it pays.

In a five-person company, the person who designs the system is often the same person who writes the proposal, checks shipments, answers service texts and chases the final invoice, which means a company can win plenty of work and still lose its week to everything around it. Those tasks matter, but not every step has to begin and end with the owner.

This guide examines that work around the work and identifies where an AI assistant can realistically take some of it off your plate. We left marketing out on purpose, because Lantern Room Marketing already handles that for our dealers, so the focus here is on running the integration business itself.

~14 h

A typical five-person integrator spends approximately 14 combined hours on each proposal, across roughly 80 proposals a year.

VENDOR · D-TOOLS BENCHMARK

88%

Proposals delivered within 48 hours closed at 88%, compared with 69.6% for the slowest firms.

VENDOR · D-TOOLS, ~250K PROPOSALS

52%

Field technicians say approximately 52% of their workday goes to paperwork and data capture.

OTHER TRADES · SERVICE COUNCIL 2024

WHAT THE RESEARCH FOUND

1. Proposals are the biggest single time sink, and the research suggests that faster proposals close more often.
2. Small companies are caught between new installs and service, so every service call pulls time away from active projects.
3. Paperwork eats into the technician's day, and as-builts and closeout documents are usually the last items to get finished.
4. Project management is mostly unpaid coordination, because even firms that charge a PM fee rarely recover all of the hours they put in.
5. Labor is the top constraint, and 51.9% of firms now use subcontractors, up approximately 15% since 2023 according to CE Pro, which adds coordination.

The tag under each number shows where it came from, and a "Vendor" tag means a software company's own claim, so page 6 explains every tag.

The principle

Let technology handle the preparation, repetition and follow-up, while design judgment, craftsmanship, pricing, system changes and client relationships stay in human hands.

What stays human

Site walks, design judgment, rack builds, terminations, programming and commissioning all stay with your people, along with pricing, labor and margin decisions, every commitment to a customer, and the approval of anything a client, builder or vendor will see. The agents in this guide prepare, chase, log and draft, while people approve every decision and do the actual work.

HOW TO USE THIS GUIDE

You do not need any experience with AI to use this guide

We recommend reading the guide in order the first time through, because each AI term is explained when it first appears and the later sections build on the earlier ones. There is also a short glossary at the back, and if you are pressed for time, pages 4 to 8 cover the essentials before the step-by-step plan that begins on page 25.

The big picture 2

What is an AI agent, and what is Grok Bot? 4

The hours, honestly: how to read our numbers 5

What the confidence labels and source tags mean 6

All ten agents at a glance 7

What the agents will not do, and the software examples 8

PART I Start here: the three starter agents 9

1. Proposal Assistant 10

2. Service Desk Triage 12

3. Project Documentation Clerk 14

PART II Advanced: the other seven agents 16

4. Intake & Discovery 17

5. Procurement Tracker 18

6. Scheduler & Dispatcher 19

7. Project Coordinator (including commercial RFIs and submittals) 20

8. Training & Handoff 21

9. Billing & Changes 22

10. Warranty & Vendor Desk 23

One agent per project 24

Your first three weeks: a beginner's step-by-step 25

Glossary: AI words in plain English 31

Where the numbers come from 32

Want help? The hands-on class 33

> **The rule to remember**
>
> An agent drafts and you decide, which means nothing an agent writes goes to a client, a builder or a vendor until you have read it and chosen to send it yourself.

PLAIN ENGLISH FIRST

What is an AI agent, and what is Grok Bot?

The easiest way to think about an AI agent is as a new office assistant on the first day of employment. It is fast, tireless and good with words, but it knows nothing about your business until you explain it, which is why its work always has to be checked.

AI (artificial intelligence)

AI is software that can read and write everyday language, so you can type to it the way you would text a coworker and it will type back.

AI agent

An agent is an AI helper set up for one task, such as a Proposal Assistant, and it maintains what you have told it about your business so you do not have to start from scratch each time.

Grok Bot

Grok Bot is the app used in this guide, and it allows you to set up several agents, each with its own name and conversation.

Chat

The chat is the conversation window with an agent, and it works much like a text thread.

Prompt

A prompt is anything you type to an agent, whether it is a request, a set of notes or a question, and clearer prompts usually produce better answers.

Draft

A draft is anything the agent writes for you, such as a proposal outline, a client reply or a device list, and it is always a starting point rather than a finished product.

Review and approve

Reviewing means reading the draft and fixing what is wrong, while approving means a person has decided that the work is ready to use.

Connector

A connector is a link that lets an agent see another tool, such as email, a calendar or a shared drive, although you do not need one to start because copy and paste works fine.

What agents are good at

- Agents are good at turning messy notes into clean, organized drafts.
- They can write the same type of document again and again without losing patience or skipping steps.
- They are particularly good at noticing what is missing from a list, such as a mount or a cable run.
- They can keep track of unresolved items and necessary follow-ups across a busy week.

What to watch for

- An agent can be wrong while sounding completely confident, so always check model numbers, quantities and dates.
- Because the agent only knows what you tell it, incomplete field notes will produce incomplete drafts, so provide as much detail as possible.
- It does not know your prices, clients or equipment until you share that information.
- It is not a technician, engineer or programmer and should never be treated as one.

THE HOURS, HONESTLY

How to read the numbers in this guide

14 to 38
HOURS A WEEK

For a typical five-person company, we estimate that all ten agents together could recover approximately 14 to 38 hours a week after you review their work. That is a rough estimate rather than a promise, because your real number will depend on your jobs, your volume and the way your team works.

Why we give a range

Every company is different, so a single number would be misleading. The low end reflects a slower week or a company that uses the agents lightly, while the high end reflects a busy week in which all ten agents are in daily use, and most companies will land somewhere in between.

Where 14 to 38 comes from

When you add up the hours for all ten agents, the total comes to approximately **18 to 47 hours** a week. We then held back about one hour in five, or 20%, for the time you will spend reading and fixing drafts, which leaves roughly **14 to 38** hours, or somewhere between a third of a full-time person and nearly one full-time position.

Two cautions

The agents overlap, which means some of the same hours appear under more than one agent, so each agent's number should be read independently rather than added up and counted as savings.

Nobody has measured this in an AV company yet, so these are scenario estimates built from industry reports. The best way to learn your own number is to time your work for a week before you begin and again afterward, as described on page 30.

How to read one agent's numbers

The Proposal Assistant, for example, shows **5 to 12 hours a week** with **medium confidence**. That means a company like yours could save somewhere in that range on proposals in a typical week, and the estimate rests on published industry data, although most of that data comes from a software company and was reduced to stay conservative. The following page explains each confidence label and source tag in more detail.

THE HOURS, HONESTLY · LABELS AND TAGS

What the labels and tags mean

Very little measured data exists on how integrators spend their hours, so every estimate in this guide carries a confidence label, and every figure carries a tag that shows where it came from.

Confidence labels *

MEDIUM CONFIDENCE	**Based on real industry data:** published figures exist for this exact type of work, although most come from software companies, so we reduced them to stay conservative.
LOW TO MEDIUM CONFIDENCE	**Partly based on data:** some real figures exist, often from other service trades or a handful of integrators, and we used our own math to fill the gaps.
LOW CONFIDENCE	**Our best estimate:** no AV-specific data exists, so we estimated from similar trades and typical job counts, which means your results may differ the most here.

* None of these labels is a guarantee, and even a Medium rating means the best data we could find rather than a measurement taken in a company like yours.

Source tags

INTEGRATOR	These are an integrator's own words or reported results.
VENDOR	This is a software or service company's own claim, and because those companies have a stake in the result, we treat the figure as a claim and discount it.
OTHER TRADES	This is field-service data from trades such as HVAC and electrical, which we used where AV-specific data does not exist.
ESTIMATE	This is our own calculation, built from the sources above and kept deliberately conservative.
OTHER NAMES	Some tags name the source directly, such as CE Pro, an industry magazine that runs surveys, or a homeowner's own online post.

Page 32 lists every source in plain words, along with the limits of the research, so you can judge each figure for yourself.

ALL TEN AGENTS AT A GLANCE

All ten agents, with the three starters first

The three starter agents come first because they are the safest and most practical place to begin, while the other seven are covered in full in Part II for when you are ready. Within Part II, the agents follow roughly the order a project moves, from the first site walk to the service call years later.

#	AGENT AND WHAT IT HANDLES	HOURS A WEEK	CONFIDENCE	WHERE TO READ
START HERE	**Part I: the three starter agents**			
01	**Proposal Assistant** Drafts equipment, accessory, labor and scope lists, handles revisions and checks for missing parts.	5–12	MEDIUM CONFIDENCE	Part I, page 10
02	**Service Desk Triage** Sorts client requests, drafts replies from that home's records and writes clean tickets.	3–8	LOW TO MEDIUM CONFIDENCE	Part I, page 12
03	**Project Documentation Clerk** Files photos and notes by room, builds the device register and assembles the closeout package.	2–5	MEDIUM CONFIDENCE	Part I, page 14
WHEN YOU'RE READY	**Part II, Advanced: the other seven agents**			
04	**Intake & Discovery** Prepares pre-visit questions and turns your site walk into a clean scope brief.	1–3	LOW TO MEDIUM CONFIDENCE	Part II, page 17
05	**Procurement Tracker** Drafts purchase orders, tracks shipments and flags backorders against the schedule.	1–3	LOW CONFIDENCE	Part II, page 18
06	**Scheduler & Dispatcher** Suggests visit times and drafts confirmations, reminders and reschedule notices.	1.5–3	LOW TO MEDIUM CONFIDENCE	Part II, page 19
07	**Project Coordinator** Writes status notes and change order drafts and keeps commercial RFI and submittal logs.	2–5	LOW TO MEDIUM CONFIDENCE	Part II, page 20
08	**Training & Handoff** Writes room-by-room quick-start guides, follow-ups and seasonal welcome-back checklists.	1–3	LOW CONFIDENCE	Part II, page 21
09	**Billing & Changes** Drafts milestone invoices, change order paperwork and payment reminders on your terms.	1–3	LOW CONFIDENCE	Part II, page 22
10	**Warranty & Vendor Desk** Tracks warranty records, RMAs and returns and sends a weekly digest of relevant notices.	0.5–2	LOW CONFIDENCE	Part II, page 23

The two biggest levers

The Proposal Assistant and Service Desk Triage together account for about half of the total hours, which makes them the two biggest levers in the group.

Per project

We estimate that one mid-size residential project could save roughly 10 to 25 hours from intake through handoff, and each active commercial project adds approximately 2 to 4 hours a week for submittals, RFIs and formal closeout. ESTIMATE

GUARDRAILS

What the agents will not do

These agents are meant to add capacity without taking control away from you, so in this guide an agent never does any of the following six things.

Program systems
Agents do no Control4, Crestron, Savant or other programming, because that work stays with your programmers.

Change devices
They have no remote control over a client's equipment, network or settings at any point.

Set prices
They never set prices, labor rates, discounts or margins, since you set every number yourself.

Place orders
An agent can draft a purchase order, but a person places or approves every order.

Send without you
Nothing goes to a client, builder or vendor until you have read and approved it.

Pose as your technician
An agent is never presented as the licensed technician, engineer or programmer on a project.

Five habits that keep you in control

1. Read-only first: begin with organizing information and writing drafts, and keep agents away from anything that touches a home's devices.

2. Human approval: proposals, prices, purchasing, invoices, outside messages and commitments always need a person's approval before they go anywhere.

3. Privacy by project: share only what a task requires, and keep passwords, gate codes and alarm codes in your secure systems rather than in a chat.

4. A path to a person: if information is missing, a client is upset or something fails, a member of your team takes over immediately.

5. Client-facing work comes last: let an agent answer clients directly only after you have tested it, and keep those answers short, read-only and drawn from that home's own records.

About the software examples

Portal is used here as a working example to show how these agents can save time and plug into an integrator's workflow. Each integrator can identify their own software stack and adapt the integrations accordingly.

When we describe what Portal does, we are repeating Portal's own published description of its product, which is a vendor claim that we have not tested, and no particular software is required for anything in this guide.

PART I

Start here with *three starter agents*

These three agents are the safest and most useful place to begin, because they operate on your side of the desk using information you already have, and none of them has to talk to a client or connect to your other software on day one. Each one follows the same layout, covering the everyday problem, what the agent does, what stays with you, the estimated hours and a worked example.

1. Proposal Assistant
2. Service Desk Triage
3. Project Documentation Clerk

PART I · STARTER

01 Proposal Assistant

5–12
hours a week

MEDIUM CONFIDENCE

THE EVERYDAY PROBLEM

"I walk the job on Tuesday, and then I spend my nights copying model numbers, adding up labor and reformatting the same kind of proposal I wrote last month. By the time it finally goes out, the client has cooled off, and then they want three revisions."

WHAT THE RESEARCH SAYS

- A mid-size proposal takes approximately 4 to 8 hours before any revisions, according to D-Tools. VENDOR · D-TOOLS
- Large proposals with 500 or more line items go through an average of 8 to 9 versions. VENDOR · D-TOOLS
- Proposals delivered within 48 hours closed at 88%, compared with 69.6% for the slowest firms. VENDOR · D-TOOLS, ~250K PROPOSALS
- One vendor describes the task as "six hours of copying model numbers from a vendor catalog, recalculating labor, cross-referencing accessories, and reformatting." VENDOR · D-TOOLS

What the agent does

- It converts your site-walk notes into a room-by-room draft that lists the equipment, the accessories each piece requires and the labor tasks.
- It prepares a short scope for each room in plain language that a homeowner can follow.
- It searches for commonly overlooked items, such as mounts, power, cable runs, network ports and rack space.
- It identifies the questions you should answer before the proposal goes out.
- It can revise the draft in a few minutes whenever the client changes their mind.

What stays with you

- You make every design decision and every equipment choice.
- You set every price, labor rate and margin, because the draft contains no prices at all.
- You decide what to promise the client and how to present the recommendation.
- You give the proposal its final read and send it yourself.

About the hours: We estimate approximately 5 to 12 hours a week, or roughly 3 to 8 hours per proposal, with medium confidence. The estimate starts from a software company's math of approximately 80 proposals a year with 6 to 8 hours saved on each, and we cut the low end in half to allow for your review time and smaller jobs. Integrator stories shared by software companies report savings of 2 to 3 hours or more per proposal.

Plugging into your workflow (Portal example)

Portal says its software builds proposals from a product catalog and can turn an accepted proposal into purchase orders. In that type of setup, the agent's draft becomes your starting list, and you build and price the real proposal in your own proposal tool, although copy and paste is all you need on day one.

Proposal Assistant: from site-walk notes to a first draft

ILLUSTRATION

This is an illustration based on a made-up job, written to show the kind of thing you might type and the kind of answer that comes back, so real results will vary.

WHAT YOU TYPE

```
Here are my site-walk notes for a new job.
Turn them into a proposal draft, room by
room. For each room list the equipment, the
accessories it requires, and the labor tasks.
Add a short scope paragraph a homeowner can
understand. No prices. Mark anything you
guessed with [CHECK] and list open questions
at the end.

Lake house, new build, builder at framing.
Approximately 4,000 sq ft, 2 floors.
Family room: 75" TV over fireplace, pull-down
mount, soundbar and sub, wants gear hidden.
Equipment closet under stairs.
Kitchen: 2 in-ceiling speakers.
Primary bedroom: TV on wall, no audio.
Whole-house Wi-Fi, 3 access points.
```

WHAT COMES BACK

Family room

Equipment: 75" display; pull-down fireplace mount rated for that size; soundbar; subwoofer; streaming device.

Accessories: recessed power and cable box behind the display; HDMI run to the stair closet [CHECK length]; power location for the sub.

Labor: pre-wire display, soundbar and sub; mount and set display; mount soundbar; terminate and test.

Scope: A 75-inch TV above the fireplace on a mount that pulls down to eye level, with a slim soundbar and subwoofer. All other equipment is hidden in the closet under the stairs.

Kitchen … **Primary bedroom** … **Network** …

Questions for you

1. Is the fireplace gas or wood? Heat clearance affects the mount. [CHECK]
2. Should the kitchen speakers be their own zone or grouped with the family room?
3. Is there ventilation in the stair closet for a rack?
4. Are there wired runs to all three access points?

How to review its work

- Review every [CHECK] marker first, since those are the places where the agent had to guess.
- Match each item against your real catalog, because agents can get model numbers wrong.
- Verify the quantities of speakers, mounts and cable runs against your notes.
- Answer its questions, and then ask for a revised draft.

Revisions are where it helps most

When the client calls back with changes, you can type them in ordinary language, as in the example below, and then re-price the revised version yourself.

```
Swap the 75" for an 85". Drop the kitchen
speakers. Add two outdoor speakers on the
patio. Show me what changed.
```

NEXT PROMPT TO TRY

```
Take this draft and give me good, better and best options for the family room. Explain the
difference between them in one plain sentence each, for the homeowner. No prices.
```

PART I · STARTER

02 Service Desk Triage

3–8
hours a week

LOW TO MEDIUM CONFIDENCE

THE EVERYDAY PROBLEM

"My lead tech is in the middle of a trim-out, and his phone will not stop buzzing with texts like 'The TV has no sound' and 'How do I turn on the patio speakers?' Half of them are two-minute answers and the other half need a truck, but just sorting them eats up the day."

WHAT THE RESEARCH SAYS

- CE Pro reports that smaller companies "often find themselves caught between new installations and reactive support demands." CE PRO 2026 STATE OF THE INDUSTRY
- OneVision notes that "the same people fielding late-night support calls are also doing installations." VENDOR · ONEVISION
- One homeowner described simple additions waiting weeks, even when they "could probably be added remotely in 15-20 minutes." HOMEOWNER · R/CONTROL4
- Only about 11% of integrators use remote monitoring tools, according to an undated Domotz figure. VENDOR · DOMOTZ, UNDATED

What the agent does

- It reviews the client's message and sorts it as a simple "how do I" question, a task for a technician, or an urgent problem.
- It prepares a draft of a short, friendly reply using only that home's own notes.
- It prepares a clean ticket that covers the client, room, symptom, start time, what they already tried and any past history.
- It identifies the questions to ask before anyone rolls a truck.
- Once you trust it, it can also help book visits, which Part II covers.

What stays with you

- Your team diagnoses the problem and decides on the fix.
- Any programming change or remote device control stays with your technicians.
- You decide which client receives the next available truck and what the service visit costs.
- You send every reply, and an upset client always goes straight to a person.

About the hours: We estimate approximately 3 to 8 hours a week, with low to medium confidence. Remote-support companies report that their trained human teams solve 60% to 96% of contacts, according to vendor claims from DGI, Parasol and OneVision, but those results come from people rather than AI. We therefore assumed that an agent fully handles or prepares only 25% to 40% of contacts, based on an assumed 10 to 20 contacts a week at 20 to 30 minutes each, and your real ticket count will change this number more than anything else.

Start on your side of the desk

At first, the agent never talks to a client directly. When a text comes in, you paste it into the chat along with that home's notes and send the reply yourself, while client-facing answers come much later, only after testing and only as short, read-only answers drawn from that home's records.

Service Desk Triage: from a client text to a sorted reply

ILLUSTRATION

This is an illustration based on a made-up job, written to show the kind of thing you might type and the kind of answer that comes back, so real results will vary.

WHAT YOU TYPE

```
A client just sent me this. Using only the home notes below: 1) If it is a simple "how do I," draft a short friendly reply I can send. 2) If it requires a tech, say so and write a ticket summary. 3) List any questions I should ask. Do not guess beyond the notes. Do not suggest programming or settings changes.

Client text (Karen, lake house): "TV in the family room comes on but no sound. Kids were using it last night. Help!"

Home notes: Family room has a TV, soundbar and sub, one remote. If no sound: press Home, choose "Watch TV." Soundbar should show HDMI ARC.
```

WHAT COMES BACK

Sort: This is likely simple, because it matches the "no sound" fix in the home notes, so no tech is needed yet.

Draft reply:
"Hi Karen, sorry about that! Try this first: on the family room remote, press Home and then pick Watch TV, which resets the TV and soundbar together. If there is still no sound after a minute or two, just reply here and we will set up a quick call or visit."

If that does not work, a ticket is ready:
Client: Karen, lake house. Room: family room. Symptom: picture but no sound. Started: last night, after the kids used it. Tried: waiting on client. History: none in notes.

Ask her: Does the soundbar light come on, and what does its display say?

How to review its work

- Confirm that the suggested solution actually comes from that home's notes rather than a guess.
- Check that the tone is right for this particular client.
- Look for any promise you cannot keep, such as a specific arrival time.
- Confirm that it sorted the request correctly, since you know the client and the system.

Why the home notes matter

Because the agent is only as good as the information you give it, a one-page "how this house works" note for each client, listing the common fixes your technicians already know, is the most useful thing you can build. The Documentation Clerk can help you write those notes.

NEXT PROMPT TO TRY · BUILD A HOME NOTES PAGE

```
Using this device list and the notes below from my technicians, write a one-page "how this house works" note for the [client] home. For each room: what is there, what controls it, and the three most common fixes in simple steps. Mark anything you are not sure of with [CHECK]. No passwords or codes.
Device list and notes: [paste]
```

PART I · STARTER

03 Project Documentation Clerk

2–5
hours a week

MEDIUM CONFIDENCE

THE EVERYDAY PROBLEM

"The job is done and the client is happy, but the as-builts are still scattered across three phones and a sticky note. Six months later, a different tech goes out and cannot find the IP list or figure out which programming file is the current one."

WHAT THE RESEARCH SAYS

- Field technicians estimate that 52% of their workday goes to paperwork and data capture, according to a study of more than 2,500 technicians. OTHER TRADES · SERVICE COUNCIL 2024
- SiteOwl says that "as-builts and install reports take days, sometimes weeks." VENDOR · SITEOWL
- "Time spent looking for information" ranks as technicians' top dislike in the same research. OTHER TRADES · SERVICE COUNCIL 2024
- Integrators describe closeout documentation as the classic late item, because it happens at the end of a project when attention has moved on. INTEGRATOR · R/COMMERCIALAV, R/CONTROL4

What the agent does

- It takes the notes, labels and photo descriptions your technicians send during the project and files them by room and device.
- It builds the device register, listing the room, device, make and model, serial number, and IP and MAC addresses.
- It maintains a backup log that shows which programming file is current, when it was saved and where it is stored.
- It assembles the closeout package and a homeowner manual written for that specific house.
- It identifies what is still missing before you can close out the project.

What stays with you

- You verify the register against what is actually in the rack.
- Your programmers own the programming and the backup files themselves.
- Passwords and codes stay in your secure system, and the register records only where they are kept.
- You personally approve the closeout package before it goes to the client.

About the hours: We estimate approximately 2 to 5 hours a week, or roughly 2 to 6 hours per closeout, with medium confidence. The estimate starts from the 52% paperwork figure from other trades and the closeout delays a vendor reports, and it assumes three technicians each avoid 1 to 1.5 hours of filing a week, plus a faster closeout package.

Plugging into your workflow (Portal example)

Portal says it can produce installer versions of a proposal and pick lists, and a list like that makes a good starting point for the device register, so you can paste it in and ask the agent to build the register around it.

Documentation Clerk: from end-of-day notes to a device register

ILLUSTRATION

This is an illustration based on a made-up job, written to show the kind of thing you might type and the kind of answer that comes back, so real results will vary.

WHAT YOU TYPE

```
Here are today's notes from the lake house job. Organize them by room. Build a device list as a table: room, device, make and model, serial, IP address, notes. Leave blanks where information is missing and list what is missing at the end. Never write down passwords. If notes mention one, just say where it is kept.

Equip closet: 24-port switch SN 4471-AB, IP .1.2, top of rack. AV receiver SN R88213, IP .1.20. Wi-Fi password on a sticky note inside the rack.
Upstairs hall: access point, IP .1.31, serial on back, did not get it.
Kitchen: access point SN AP-0932.
Photo 1: back of rack, labels done. Photo 2: family room wall before drywall.
```

WHAT COMES BACK

Room	Device	Serial	IP	Notes
Equip. closet	24-port switch	4471-AB	.1.2	Top of rack
Equip. closet	AV receiver	R88213	.1.20	
Upstairs hall	Access point	*missing*	.1.31	Serial on back
Kitchen	Access point	AP-0932	*missing*	

Photos filed: equipment closet (rack labels) and family room (wall before drywall).

Still missing: the make and model for all four devices, the serial for the upstairs access point and the IP for the kitchen access point.

Flag: the Wi-Fi password is on a sticky note in the rack, so the register only says where it is, and I suggest moving it into your password system.

How to review its work

- Spot-check serial numbers and IP addresses against the labels in your photos.
- Confirm the missing-items list, and then send a technician back for those details.
- Make sure no password or code slipped through into the register.

Make it a daily habit

The real benefit comes from doing this a little every day while the project is active rather than all at once at the end, since ten minutes of pasting notes on a Friday beats days of digging at closeout.

NEXT PROMPT TO TRY · CLOSEOUT PACKAGE

```
Using the device register and notes for the [job name] job, build a closeout package outline: device list, programming backup log (file name, date, where stored), a room-by-room homeowner guide, warranty details, and who to call for service. List everything that is still missing.
```

PART II

Advanced: *the other seven agents*

Turn to this part once the three starter agents have become a comfortable, regular routine. These seven agents cover the rest of the project, from the first call to the years after the install, and several of them work best once they can see your email, calendar or project software through a connector, so it makes sense to add them one at a time. Each one follows the same layout as Part I, and the section ends with a simple way to organize your work by job, with one agent per project.

4. Intake & Discovery

5. Procurement Tracker

6. Scheduler & Dispatcher

7. Project Coordinator (including commercial RFIs and submittals)

8. Training & Handoff

9. Billing & Changes

10. Warranty & Vendor Desk

One agent per project

PART II · ADVANCED

04 Intake & Discovery

1–3
hours a week

LOW TO MEDIUM CONFIDENCE

THE EVERYDAY PROBLEM

"I learn everything on the first walk, but then it lives in my head or a notebook, and I end up asking the client the same questions again at proposal time. With second homes, I am often walking the house with the builder instead of the owner."

WHAT THE RESEARCH SAYS

- Approximately 73% of security integrators still survey sites with "paper, pencil, and a notebook," and gathering accurate site information is their top design challenge. 2022 PHYSICAL SECURITY BENCHMARK
- No one has measured intake hours for AV firms, so the hours shown here are an estimate.

What the agent does

- It prepares a draft of a pre-visit questionnaire about who lives in the home, the rooms, daily routines and what they dislike about their current setup.
- It converts walk notes or a voice-memo transcript into a scope brief covering the people, rooms, goals, constraints and open questions.
- On commercial jobs, it builds a requirements checklist from spec sections, IT standards and RFP documents.
- It organizes the client's details so they are ready to enter into your own system.

What stays with you

- You conduct the site walk and interpret what the client actually wants, which no agent can do on your behalf.
- You make every design decision and decide whether the project is right for your company.
- You review the questionnaire and personally decide when to send it to the client.

About the hours: We estimate approximately 1 to 3 hours a week, or 30 to 90 minutes per new opportunity, with low to medium confidence. The figure assumes approximately 80 opportunities a year, or roughly 1.5 a week, based on a vendor benchmark for five-person firms.

From a site walk to a scope brief

ILLUSTRATION

This is an illustration based on a made-up job, so real results will vary.

WHAT YOU TYPE

```
Turn this voice-memo transcript from today's
walk into a scope brief with headings: people
involved, rooms and goals, constraints, open
questions. "Walked it with Dave the builder.
Owners are in Florida till May. They want
music everywhere, but she hates visible
speakers..."
```

WHAT COMES BACK

People: the owners, who are away until May, and Dave, the builder. **Rooms and goals:** whole-home music with no visible speakers. **Open questions:** Which rooms need music, who approves the design while the owners are away, and are there architect drawings yet?

START IT WITH

You can start by pasting in your walk notes or a voice-memo transcript.

LATER, WITH A CONNECTOR

Later, a connector could let it see your email and your client records, such as the client record in Portal.

PART II · ADVANCED

05 Procurement Tracker

1–3
hours a week

LOW CONFIDENCE

THE EVERYDAY PROBLEM

"The quote is three weeks old by the time we order, and I am re-keying the PO from the proposal by hand. Then half the order ships, and nobody notices the speakers are backordered until the trim date."

WHAT THE RESEARCH SAYS

- Distributors and vendors describe the same common problems, which are that quotes go stale before ordering, backorders slip rough-in and trim dates, POs are re-keyed by hand and partial shipments go unreconciled.
- We found no integrator-reported procurement hours, so the hours shown here are an estimate.

What the agent does

- It prepares drafts of purchase orders from the accepted proposal for your review.
- It reviews the order confirmations and shipping emails you give it.
- It maintains an open-items list for each project that shows what has been ordered, shipped, partly shipped or backordered.
- It flags anything that will not arrive before the phase that requires it, such as pre-wire, trim or final.
- It reminds you to re-check pricing on older quotes before you order.

What stays with you

- You place or approve every order and choose the suppliers and any substitutes.
- Prices and payment stay with you and your office.
- You decide when and how to inform the client about a delay.

About the hours: We estimate approximately 1 to 3 hours a week, or 30 to 90 minutes per job, with low confidence. The figure assumes that one or two active projects are ordering each week, plus the time spent re-keying and tracking.

From shipping emails to an open-items list

ILLUSTRATION

This is an illustration based on a made-up job, so real results will vary.

WHAT YOU TYPE

```
Here is the equipment list from the accepted
lake house proposal and two shipping emails.
Make an open-items list. Trim-out is the week
of March 9. Flag anything at risk.
```

WHAT COMES BACK

Shipped: the switch, receiver and three access points. **Partial:** six of eight in-ceiling speakers. **At risk:** two in-ceiling speakers are backordered until after trim-out, so you may want to ask the supplier about an alternative or move kitchen trim back a week.

START IT WITH

You can start by pasting in the accepted proposal and the order and shipping emails.

LATER, WITH A CONNECTOR

Later, a connector could link it to your inbox for order and tracking emails and to your proposal software, and Portal says it can turn a proposal into a purchase order.

PART II · ADVANCED

06 Scheduler & Dispatcher

1.5–3
hours a week

LOW TO MEDIUM CONFIDENCE

THE EVERYDAY PROBLEM

"The builder slips drywall a week, and suddenly three appointments move. The homeowner is out of state, the house manager handles access, and a service call has just jumped the line."

WHAT THE RESEARCH SAYS

- In field service generally, approximately 47% of visits do not go to plan, booking a visit takes approximately 17 minutes, and changing one takes approximately 15.

OTHER TRADES · FIGURES WIRECLAD CITES FROM SALESFORCE; ORIGINAL NOT REVIEWED

What the agent does

- It suggests visit times that fit your technicians' calendars.
- It prepares drafts of confirmations and reminders for clients, builders and house managers.
- It notes who provides access and where the access details are kept, without ever recording the codes themselves.
- When one date moves, it lists every affected appointment and drafts the reschedule messages.

What stays with you

- You control the final calendar and decide which job receives priority.
- You approve every message before it is delivered to anyone outside your company.
- Gate, door and alarm codes stay in your secure system.

About the hours: We estimate approximately 1.5 to 3 hours a week, with low to medium confidence. The figure assumes 6 to 10 bookings or changes a week for three technicians at 15 to 17 minutes each, based on data from other trades, plus some rework.

From one builder delay to a reschedule plan

ILLUSTRATION

This is an illustration based on a made-up job, so real results will vary.

WHAT YOU TYPE

```
The builder just moved drywall at the lake
house back one week. Here is our schedule for
the next three weeks. What else moves? Draft
the messages.
```

WHAT COMES BACK

Affected: trim-out moves one week, and TV mounting and the handoff both follow it. **Drafts for your review:** a note to the owners, a message to the house manager about access, and a confirmation of the new dates for the builder.

START IT WITH

You can begin with a typed list of the next few weeks of appointments.

LATER, WITH A CONNECTOR

Later, a connector could link it to your shared calendar and to email or text for confirmations.

PART II · ADVANCED

07 Project Coordinator

2–5
hours a week

LOW TO MEDIUM CONFIDENCE

THE EVERYDAY PROBLEM

"On a custom home, I am one trade out of twelve, and I spend hours on meetings, drawings and builder texts that I never bill for. When the client mentions two more speakers in passing, that change order never gets written."

WHAT THE RESEARCH SAYS

- One integrator wrote that "most smaller companies, even with a PM fee, rarely recoup an hourly rate for all the hours they end up putting into a project." INTEGRATOR · R/CONTROL4
- CE Pro found that 51.9% of firms now use subcontractors, up approximately 15% since 2023. CE PRO 2025 WAGE & SALARY SURVEY
- In the electrical trade, commercial project managers report spending "days pulling cut sheets" for submittals. OTHER TRADES · ELECTRICAL

What the agent does

- It prepares weekly status notes for the client, builder and designer from your project notes.
- It prepares drafts of rough-in confirmation requests to the builder.
- It identifies scope changes in emails and prepares a change order for your approval.
- On commercial jobs, it maintains the submittal and RFI log, drafts RFIs and assembles submittal packages from the cut sheets you provide.

What stays with you

- You make the decisions on the project and own the relationships with the builder and GC.
- You price every change order and get it signed.
- You approve every message before it is delivered to the builder or any other trade.

About the hours: We estimate approximately 2 to 5 hours a week on residential work, plus approximately 2 to 4 hours a week for each active commercial project, with low to medium confidence, assuming three to five active projects that each need 30 to 60 minutes of chasing and status writing a week.

A change order and a commercial RFI

ILLUSTRATION

This is an illustration based on a made-up job, so real results will vary.

WHAT YOU TYPE

```
Client emailed: "Could we add music on the
patio too?" Draft a change order (no prices)
and add it to this week's status note. Also,
for the office job, draft an RFI: drawings
show 4 displays in Conference B, spec says 3.
```

WHAT COMES BACK

Change order draft: two outdoor speakers on the patio, wired and connected to the music system, with the price left for you. **RFI draft:** "Drawing A-201 shows four displays in Conference B, but the spec lists three, so please confirm the count." Logged as RFI 7, open.

START IT WITH

You can begin by pasting in your project notes and the relevant emails from the client and builder.

LATER, WITH A CONNECTOR

Later, a connector could link it to a shared project inbox, your project portal and the change orders in your proposal software.

PART II · ADVANCED

08 Training & Handoff

1–3
hours a week

LOW CONFIDENCE

THE EVERYDAY PROBLEM

"I train whoever happens to be home on handoff day. Then the spouse calls, the house manager calls and the guests cannot work the TV, and it is the same three questions on every job."

WHAT THE RESEARCH SAYS

- An installer blog notes that training often reaches whoever happens to be there, when it should include the spouse, kids, house manager and staff, and that typical calls begin with "Which remote..." or "Why is the TV on the wrong input?" INTEGRATOR · DG TECHNOLOGIES
- Another installer says that "one follow-up tweak a week later... prevents five 'Can you just...' calls," although that reflects one installer's experience. INTEGRATOR · PIXIE

What the agent does

- It prepares a one-page quick-start guide for each room from the as-built, in plain language.
- It prepares a draft of a short instructional video script that you can record on your phone.
- It prepares a draft of the one-week follow-up message for your review.
- It locates the correct guide when a "how do I" question comes in.
- It prepares a seasonal "welcome back" checklist before an owner arrives for the season.

What stays with you

- You lead the in-person training and make any follow-up visit.
- You check that every step is correct for that home before the client receives it.

About the hours: We estimate approximately 1 to 3 hours a week, or 1 to 2 hours of preparation per handoff, with low confidence. The figure assumes one handoff every one to two weeks, plus two to four repeat calls avoided.

From an as-built to a room quick-start

ILLUSTRATION

This is an illustration based on a made-up job, so real results will vary.

WHAT YOU TYPE

```
Using the lake house device list and room
notes, write a one-page quick-start for the
family room. Short steps a guest could
follow. Big headings.
```

WHAT COMES BACK

Family Room Quick Start. Watch TV: press Home, then choose Watch TV. **Music:** open the music app and pick Family Room. **No sound?** Press Home, then Watch TV again. **Still stuck?** Text us at [your number].

START IT WITH

You can begin with the device register and room notes from your Documentation Clerk.

LATER, WITH A CONNECTOR

Later, a connector could link it to your homeowner manual library and to email or text for follow-ups.

PART II · ADVANCED

09 Billing & Changes

1–3
hours a week

LOW CONFIDENCE

THE EVERYDAY PROBLEM

"We finish trim and forget to bill the milestone for two weeks, and a change we agreed to on site never gets written up. Chasing the final payment is the worst part of my job."

WHAT THE RESEARCH SAYS

- Industry guidance from NSCA, CEDIA and D-Tools advises billing each milestone promptly and using signed, itemized change orders.
- On commercial jobs, data from other trades shows that slow closeout often holds up the final payment. OTHER TRADES
- One software company claims a 70% cut in accounts receivable in a case study, but we saw only its title, so treat it as a claim. VENDOR · D-TOOLS

What the agent does

- It prepares drafts of milestone invoices on your payment schedule, whether for a deposit, a progress payment or the final payment.
- It converts approved changes into change order paperwork, so the additional work is billed accurately.
- It prepares drafts of polite payment reminders on the terms you set.
- It maintains a running record of what has been billed, what remains unbilled and what is overdue.

What stays with you

- You set every amount and term, and you approve and send each invoice.
- You make any collection calls, and your books stay with you and your bookkeeper.

About the hours: We estimate approximately 1 to 3 hours a week, with low confidence. The figure assumes three to five invoices or change orders a week at 15 to 30 minutes each, plus time spent chasing payments.

From a milestone to an invoice draft

ILLUSTRATION

This is an illustration based on a made-up job, so real results will vary.

WHAT YOU TYPE

```
Lake house hit trim-out today. Our schedule
is 50% deposit, 40% at trim, 10% at handoff.
Contract total is [amount]. Draft the trim
invoice description and a friendly cover
note. List any approved change orders not yet
billed.
```

WHAT COMES BACK

Invoice line: progress payment 2 of 3 for completed trim-out, at 40% of the contract. **Cover note:** "Good news: trim-out is done..." **Unbilled:** change order 2 for the patio speakers has been approved but not yet invoiced.

START IT WITH

You can begin with your payment schedule and the milestone you just reached.

LATER, WITH A CONNECTOR

Later, a connector could link it to your proposal and accounting software, and Portal says it offers payment schedules, linked change orders and QuickBooks sync.

PART II · ADVANCED

10 Warranty & Vendor Desk

0.5–2
hours a week

LOW CONFIDENCE

THE EVERYDAY PROBLEM

"A receiver dies at 14 months, and I need to know whether it is under warranty, where the serial number is and who handled the RMA last time. Meanwhile, I get so many firmware and recall emails that I ignore all of them."

WHAT THE RESEARCH SAYS

- The trade magazine Residential Systems has written about the "information overload" that integrators receive from their vendors.
- No one has measured the hours integrators spend on warranty and RMA work, so the hours shown here are an estimate.

What the agent does

- It compares the install date and serial number from your device register against the warranty terms you provide.
- It prepares a draft of the RMA form text and tracks the return until the replacement is installed.
- Each week, it matches the manufacturer notices you forward or paste in against the gear you actually installed and lists the clients who are affected.

What stays with you

- You decide whether to repair or replace and handle all contact with the manufacturer.
- You install any firmware update yourself, since nothing is ever updated automatically.
- You decide what to tell the client and how to explain any additional cost or delay.

About the hours: We estimate approximately 0.5 to 2 hours a week, with low confidence. The figure assumes one to three RMAs or vendor notices a week at 20 to 40 minutes each.

From a pile of vendor emails to a short digest

ILLUSTRATION

This is an illustration based on a made-up job, so real results will vary.

WHAT YOU TYPE

```
Here are this week's three manufacturer
emails and our device register. Which notices
affect gear we installed? List the clients
and what to do.
```

WHAT COMES BACK

Affects you: one firmware notice for an access point model installed at four clients. **Does not affect you:** the other two notices. **Your decision:** whether and when to schedule the updates.

START IT WITH

You can begin with your device register and the vendor emails pasted in.

LATER, WITH A CONNECTOR

Later, a connector could link it to your email so notices arrive on their own, and a weekly routine could produce the digest.

PART II · ADVANCED · ORGANIZING BY JOB

One agent per project

The agents in this guide are organized by task, but once you are comfortable with them, it helps to organize your work by job as well.

Medium and larger projects: their own project agent

Each medium or larger project receives its own project agent, which maintains the scope, selections, decisions, change orders, device list and approvals, along with the builder and trade contacts, in one place.

Anyone on the team can ask it a question instead of searching old texts, and at handoff its record becomes the start of the service history.

Small jobs: one shared "Small Jobs" agent

Small jobs such as a TV mount, a Wi-Fi fix or a single visit do not need their own agent, because the setup would take longer than the project is worth.

Instead, one shared "Small Jobs" agent keeps a short record for each client, so you do not end up with dozens of abandoned agents that nobody opens.

Rule of thumb

A job gets its own agent if it involves **more than one visit**, **more than one trade** or a **likely change order**, and otherwise it goes into Small Jobs. When a small job grows, you can promote it by creating a dedicated project agent and transferring its record.

Asking the project agent a question

ILLUSTRATION

This is an illustration based on a made-up job, and a project agent can only answer from what your team has given it.

WHAT YOU TYPE

```
What did we agree on for the theater screen,
and who approved it?

Also: who is the electrician on this project,
and when is rough-in?
```

WHAT COMES BACK

Theater screen: the screen is 120 inches, changed from 110 inches by change order 3, and the owners approved it by email after the design meeting. The builder confirmed the wall blocking at framing.

Electrician: [name and phone from your contacts].
Rough-in: the week of [date], according to the builder's last update. [CHECK] The builder may have moved this date.

How it fits with the task agents

The task agents still do the drafting, so when a draft such as a change order or the device register is approved, paste it into that project's agent to keep the record complete.

The same rules apply

The agent records only where passwords and codes are kept, and it sends nothing without you. Because its purpose is organization, we have no hours data for it, and step 7 on page 29 shows the setup.

YOUR FIRST THREE WEEKS · STEPS 1 AND 2

A complete beginner's step-by-step

Set aside approximately an hour for steps 1 through 4, and keep in mind that you do not need to connect email, calendars or any of your software to start, because everything here works with copy and paste.

1 Open Grok Bot for the first time

- Open the Grok Bot application on your computer and sign in to your account. If you are ever unsure whether you are signed in, open **Settings** with the **account button at the bottom-left of the sidebar**, which shows your picture and account name, and look for the account card on the **General** tab. On a Mac, pressing Cmd and the comma key also opens Settings.
- Take a quick look around the application before you begin. The **sidebar** on the left lists your agents, and each agent has its own **chat**, where your messages and its answers appear together like a text thread.
- Clicking an agent's name at the top of its chat opens its **info pane**, which shows that agent's details and its **Routines** list, and on a Mac the shortcut is Cmd+Shift+I. You can close the pane with the **X** in its own header.

2 Create your first agent, the Proposal Assistant

- Open Grok Bot and start a new agent, which will appear as a new row in the sidebar with its own chat.
- Give the agent a clear name that describes its responsibility. To do that, click its name at the top of the chat to open the info pane, and then click the **gear** beside the **X** to open the agent's own settings page, where you can set its **name**, **title**, **description** and picture.
- For this first agent, use the name **Proposal Assistant** and a description such as "Drafts proposals from my site-walk notes, never sets prices and never sends anything."
- Keeping one agent per job makes things easier to manage, and you will add a **Service Desk Triage** agent and a **Project Documentation Clerk** the same way later on.
- If you create an agent by mistake, right-click its row in the sidebar and choose **Delete**. Be aware that this is permanent, because it removes the agent and its whole conversation, although the app asks you to confirm first.

Before you start, gather these four items

- Find one finished proposal from a past job and remove the prices.
- Gather the site-walk notes from that same project, including any measurements and client requests.
- Collect two or three real service texts or emails from clients.
- Save one day of your technicians' end-of-day notes from an active project.

If a screen in your version looks a little different from this description, that is normal, because apps update often, so look for the same words or ask the agent in its chat, for example "How do I rename you?"

YOUR FIRST THREE WEEKS · STEP 3

Tell the agent about your business

Because an agent knows nothing about your company on day one, your first message should be a short introduction, much like what you would tell a new office hire. Copy the message below into the chat, fill in the brackets and send it, and then repeat this once for each new agent you create.

COPY AND PASTE · YOUR BUSINESS INTRODUCTION

```
Hi. You are going to help me run my custom integration business. Here is what you need to know.

Company: [name], based in [area]. We are [number] people: [roles, for example owner and designer, office coordinator, three technicians].

Work: mostly residential, some commercial. We install [for example: whole-home audio and video, lighting control, shades, networking, control systems from brands like ...].

Clients: [for example: custom new builds and second homes. We work with builders, architects and designers.]

How we write proposals: [for example: room by room, good/better/best options, plain-language scope].

Rules you always follow:
1. Never include prices, labor rates or margins. I set those.
2. Never send anything to anyone. You write drafts for me to review.
3. If you are not sure about something, mark it [CHECK] instead of guessing.
4. Never suggest programming or device changes.
5. Write in a warm, plain, professional tone.

Please repeat these rules back to me in your own words so I know you understood.
```

What should come back

The agent should repeat your rules in its own words, and if it makes a mistake, you can correct it by typing something like "Rule 1 is not right, because you must never include prices." You can also add rules at any time by typing "New rule:" followed by the rule.

Good things to share

- Tell it what you install and which brands you prefer.
- Share your proposal style, or a past proposal with the prices removed.
- Describe your team's roles, using first names if you like.
- List the vocabulary you prefer to use with clients, along with the terms you never use.

Things not to share

- Never share passwords, Wi-Fi keys, or gate, door or alarm codes.
- Leave out credit card, bank and tax identification numbers.
- Skip any client financial or personal details the task does not need.
- Keep your cost sheets and profit margins out of the chat entirely.

YOUR FIRST THREE WEEKS · STEP 4

Give the agent its first task

Begin with a **past** job you have already finished, because you already know the correct answer and can see how close the agent comes. Copy one of these prompts into the matching agent's chat, paste your own notes where it says to, and send it.

1 · PROPOSAL ASSISTANT · STARTER PROMPT

```
Here are my site-walk notes for a project. Turn them into a proposal draft, room by room. For each room, list the equipment, the accessories it requires (mounts, power, cables, network) and the labor tasks. Write a short scope paragraph for each room that a homeowner can understand. No prices. Mark anything you guessed with [CHECK]. At the end, list the questions I should answer before this goes out.
Notes: [paste your notes]
```

2 · SERVICE DESK TRIAGE · STARTER PROMPT

```
A client sent me the message below. Using only the home notes I give you: 1) Tell me if this is a simple "how do I," requires a technician, or is urgent. 2) If simple, draft a short, friendly reply I can send. 3) If it requires a technician, write a ticket summary: client, room, symptom, when it started, what they tried. 4) List questions I should ask. Do not guess beyond the notes. Do not suggest programming or settings changes.
Client message: [paste]
Home notes: [paste]
```

3 · PROJECT DOCUMENTATION CLERK · STARTER PROMPT

```
Here are notes from the [job name] job. Organize them by room. Build a device list as a table with: room, device, make and model, serial number, IP address, notes. Leave a blank where information is missing and list everything missing at the end. Never write down passwords or codes. If the notes mention one, record only where it is kept.
Notes: [paste]
```

If the answer is not what you wanted

- If the answer is too long, type "Make it half as long."
- If it is too vague, give it more detail and ask it to try again.
- If the format is wrong, ask it to "Put that in a table."
- If it seems to have guessed, tell it to "Only use what I gave you."
- If the tone is off, ask for something "warmer and less formal."
- If it loses track of your rules, paste them in again.

If you are not sure yet how to share a photo with the agent, type a one-line description of each photo instead, which works fine when you are starting out. Before pasting any notes, remember to remove passwords and security codes.

YOUR FIRST THREE WEEKS · STEPS 5 AND 6

Review, approve and stay safe

5 Review and approve every draft

Approving a draft means you have read it and decided it is right, and the same short routine works for every draft:

- Read all of it rather than just the top, because agents can be wrong while sounding completely sure.
- Look for the [CHECK] marks and answer each one before you go further.
- Verify the facts that matter most, including model numbers, quantities, dates, names and addresses.
- Ask for fixes in plain words, such as "Make it shorter," "You overlooked the patio" or "Use our standard labor categories," and the agent will redo it.
- Move the final version into your own tools, add your prices and send it yourself.

If the agent ever asks your permission before doing something, read the request carefully and say yes only if it is exactly what you want, and when in doubt, say no and ask it to explain.

6 Safety basics

Never paste these

- Never paste passwords, Wi-Fi keys, or alarm, gate or door codes.
- Keep credit card, bank and Social Security numbers out of every chat.
- Leave out anything you would not want a new employee to read on the first day.

Always do these

- Approve everything personally before it leaves your company.
- Write down where a password is kept rather than the password itself.
- Transfer an upset client to a real person immediately.
- Keep agents away from device controls of any kind.

Common first-week questions

Will it send something by mistake? In the setup this guide describes, you have not connected email or any of your software, and your rules tell the agent to draft only, so if it ever asks permission to do something, say no unless you want it done.

Will it remember what I told it? Each agent maintains its own conversation, so you can refer back to earlier messages, and if it seems to forget a rule, you can simply remind it.

What does it cost? You can check your plan and usage in Settings on the Usage & Billing tab, which appears on accounts where it is turned on.

Finally, remember that an agent is a helper rather than a technician, so it never signs off on work and is never presented to a client as the person responsible.

YOUR FIRST THREE WEEKS · STEP 7

Give a bigger job its own agent

Once your three starters feel routine, you can begin organizing your work by job. Use the rule of thumb from page 24, which says a project receives its own agent if it involves more than one visit, more than one trade or a likely change order.

7 Set up a project agent

- Create a new agent the same way you did in step 2, following the identical process.
- Name it after the project by opening its info pane, clicking the **gear** beside the **X** and setting the **name** and **description**, for example **Project: Lake House** with the description "Keeps the full record for the lake house job."
- Send it your business introduction from step 3, and then paste in the project start prompt below.
- Set up one more agent named **Small Jobs**, just once, to handle single visits such as a TV mount or a Wi-Fi fix.

COPY AND PASTE · PROJECT START PROMPT

```
You are the project agent for the [job name] job. Keep a running record under these headings: scope, selections, decisions, change orders, device list, approvals (who approved what, and when), and contacts for the builder and each trade.

When I paste in notes, emails or approved drafts, file them under the correct heading. When anyone asks a question, answer only from this record, and say so if the answer is not there. Never record passwords or codes, only where they are kept.

Project basics: [job name and area], [client], [builder, designer and trades], [start date], [short scope].
```

For the Small Jobs agent

```
Keep a short record for each client: date, what we did, devices touched, anything to remember next time. One entry per visit.
```

When a small job grows, promote it

```
Write everything you have on the [client] job as one summary I can paste into a new project agent.
```

Once the agent writes that summary, paste it into the new project agent so the full history carries over.

Keep it current

After each site visit, meeting or approval, paste the notes or the approved draft into that project's project agent, because the record is only as good as what goes into it. Once a week, it also helps to ask the agent, "What is still open on this project?"

YOUR FIRST THREE WEEKS · THE PLAN

Week 1, week 2 and week 3

Before you start, write down three numbers from a normal week so you can compare them with the same numbers after three weeks of using the agents.

MEASURE	BEFORE (RECORD ACTUAL)	AFTER THREE WEEKS (COMPARE)
Hours spent on proposals		
Time to first reply on a service request		
Owner's weekly admin hours		

WEEK 1

1 · Proposal Assistant

- Work through steps 1 to 5 of this guide, completing each one before continuing.
- Run one **past** job through the agent and compare its draft with what you actually sent.
- Try one **live** proposal draft once you are comfortable.
- Record how long your review took each time, so you can compare later.

WEEK 2

2 · Service Desk Triage

- Create the second agent and send it your business introduction.
- Prepare a one-page "how this house works" note for two or three regular clients.
- Paste in real requests and review the draft replies, while still sending every one yourself.

WEEK 3

3 · Documentation Clerk

- Create the third agent and pick one active project to practice on.
- Paste in your technicians' end-of-day notes every afternoon, along with any photo descriptions.
- Review the device register with your team on Friday.
- Fill in the "After" column at the end of the week, using the same measurements as before.

When to move to Part II

You are ready for Part II when the following four things are true:

- ✓ You use the three starter agents most weeks without having to think about the process.
- ✓ Your review time is going down, and the drafts need fewer fixes.
- ✓ You have recorded your before and after numbers for each of the three agents.
- ✓ You can identify the next task that is costing your team the most hours this month.

At that point, add one Part II agent at a time, starting on page 16, and give your bigger jobs their own project agent as described in step 7 on page 29. Connect email, calendars or project software only after you have decided what each agent may see and what it may never do. A task that an agent repeats on a schedule, such as a Friday warranty digest, is called a **routine**, and each agent's routines are listed in its info pane.

GLOSSARY

AI words in plain English

AI (artificial intelligence)
AI is software that reads and writes everyday language, so you can type to it and get a typed answer back.

AI agent
An agent is an AI helper set up for one task, with its own name and its own conversation.

Approve / approval
Approval means a person has read a draft or request and decided yes or no, and nothing goes out without it.

Business introduction
This is your first message to a new agent, which describes your company and explains the rules it must follow.

Chat
The chat is the conversation window with an agent, and it works much like a text thread.

[CHECK]
This is a marker we ask the agent to place on anything it guessed, so you immediately know where to concentrate your review.

Confidence label
This is our rating on each hours estimate, from Medium (based on real industry data) to Low to medium (partly based on data) and Low (our best estimate), as explained on page 6.

Confident errors
AI can state something inaccurate as if it were completely true, which is why every draft requires careful review.

Connector
A connector is a link that lets an agent see another tool, such as email or a calendar, although you do not need one to start.

Draft
A draft is anything an agent writes for you, and it is always a starting point rather than the final version.

Grok Bot
Grok Bot is the application used in this guide to create agents and communicate with them.

Gross and net hours
Gross hours are the total time the agents could save, while net hours are what remains after your review time.

Info pane
The info pane is the panel that opens when you click an agent's name at the top of its chat, and it shows the agent's details and routines.

Project agent
A project agent is set up for one medium or larger project, and it maintains that project's full record in one place.

Prompt
A prompt is anything you type to an agent, whether it is an instruction, a collection of notes or a question.

Range
A range is a low and a high estimate, such as 3 to 8 hours, and your own number depends on your business.

Read-only
Read-only means the agent can look at information but cannot change anything.

Routine
A routine is a task an agent repeats on a schedule, such as a weekly digest of vendor notices.

Sidebar
The sidebar is the list on the left side of Grok Bot that displays all of your agents.

Source tags
These tags, which include Integrator, Vendor, Other trades and Estimate, show where each number came from, as explained on page 6.

WHERE THE NUMBERS COME FROM

The evidence and its limits

This guide condenses an internal research review from November 16, 2026, on how small custom integration firms spend their week. It draws on industry reports, trade press, integrator discussions and research from other field-service trades, so it should not be read as a measured case study of any one company.

What that means in plain words

- Most of the proposal numbers come from software companies, mainly D-Tools, and because they sell proposal software, we treat their figures as claims and reduce them.
- The paperwork, scheduling and field-visit figures come from other trades, such as HVAC and electrical, because AV-specific studies do not exist.
- The service desk results reported by remote-support companies describe trained human teams rather than AI, so they do not prove what an AI agent will do.
- No one has measured intake, procurement, scheduling, documentation, training or warranty hours in AV companies, so those rows are our own estimates.
- Because the hours overlap between agents, they should not be added up as guaranteed savings.
- Your own numbers, such as proposals per year, weekly service contacts and current software, will tighten every range considerably.

Sources

D-Tools proposal benchmarks, Scorecard and Year in Review 2025 (Vendor). CE Pro 2026 State of the Industry and 2025 Wage & Salary Survey (trade press). Service Council 2024 field technician study (Other trades). 2022 Physical Security Benchmark (security integrators). OneVision, Parasol, DGI and Domotz remote support data (Vendor). SiteOwl and WeQuote (Vendor). Field-service figures cited by Wireclad from Salesforce (Other trades; original not reviewed). Installer guidance from DG Technologies and PIXIE (Integrator). NSCA and CEDIA change order and progress payment guidance (trade associations). Residential Systems (trade press). Portal.io product descriptions (Vendor). Integrator discussions on r/Control4 and r/CommercialAV (Integrator).

Make the numbers yours

Four facts about your own company will replace most of our estimates with real numbers:

- Count how many proposals you write in a year.
- Track how many service contacts come in each week.
- List the software you use today for proposals, projects and billing.
- Note whether remote monitoring is installed at your clients' homes.

Some sources were read only as summaries or titles, including the full CE Pro 2026 report, which is gated, the D-Tools accounts-receivable case, the undated Domotz 11% figure and the Salesforce booking times, so verify the current source documents before reusing any figure as a claim.

A DIFFERENT KIND OF GROWTH

Our goal is to give integrators more time *for the work only they can do.*

For a small integration company, the opportunity lies in a business that remembers what was promised, keeps projects moving and stays present for the homeowner long after the install, rather than in more dashboards or automation for its own sake.

Want to set this up together?

Lantern Room Marketing offers a hands-on class for integrators in which we walk through this guide step by step, set up a first agent together and practice on the type of proposals, service requests and project notes you handle every week. No previous experience with artificial intelligence is necessary to participate.

Sign up: [CLASS SIGN-UP LINK]

A good place to start is with one question:

Where does your team lose the most time, and what should they be doing instead?