



AI TOOLS ASSESSMENT REPORT

Prepared for

Ridgeline Construction Group

Denver, Colorado

March 2026

Prepared by the Toodlebox team

Disclaimer: This is a sample report. Ridgeline Construction Group is a fictional company created to show what a completed AI Tools Assessment may look like for your company. The data in this report is fictional. The format of this document may vary as well as the presentation of the material.

01 Executive Summary

Ridgeline Construction Group is a 34-person general contractor handling residential remodels and light commercial buildouts across the Denver metro. This assessment is based on a 45-minute discovery call with ownership and the office team, followed by a review of how work actually moves through the business day to day.

The short version: nothing here is broken, but a lot of it is manual. Field updates, subcontractor paperwork, client check-ins, and RFI tracking all depend on someone remembering to do them by hand — usually the same two or three people. That's the reason two recent projects slipped behind schedule.

12 hrs/wk	6	2 weeks
admin time identified	opportunities ranked	to first three live

Where the time is going today

Recurring task	Who	Hrs / week
Compiling field reports from text updates	Office Mgr.	2-3
Fielding reactive client status calls	PMs	1-2
Chasing subcontractor compliance documents	Office Mgr.	2-3
Manually coding vendor invoices to job/cost code	Office Mgr.	3-4
Total identified		~12

Not included above: re-keying takeoffs for estimates, which adds 6-8 hours per bid across roughly five bids a week. That's a separate, bid-based cost — addressed under AI-Assisted Estimating in Phase 2.

The team

- 6 office and admin staff, 4 estimators/project managers, and 24 field crew and superintendents across active jobs.
- Everyone already works inside Microsoft 365 and Teams — email, scheduling, and most file storage run through it today.
- No dedicated IT or ops hire; the office manager handles most software and process questions on top of her regular workload.

02 Priority Matrix

Every opportunity we identified, ranked by impact to Ridgeline and how quickly it can be in place.

#	Opportunity	Impact	Timing	Measured in
1	Daily Field Reports	High	Week 1	~2-3 hrs / wk
2	Client Update Automation	High	Week 1	~1-2 hrs / wk

#	Opportunity	Impact	Timing	Measured in
3	Subcontractor Compliance Tracking	High	Week 2	~2-3 hrs / wk
4	RFI & Submittal Tracking	High	Week 2	Delay risk
5	AP Invoice Coding	Medium	Phase 2	~3-4 hrs / wk
6	AI-Assisted Estimating	High	Phase 2	6-8 hrs / bid

Opportunities 1-4 are the focus of this engagement and the two-week plan that follows. Items 5 and 6 are worth revisiting once those are running.

03 The Recommendations

Detail on the four opportunities we'd tackle first — what's happening today, what we'd change, and what it's worth.

1. Daily Field Reports

TODAY	RECOMMENDED
Superintendents text photos and updates to a group chat. The office manager manually compiles them into a daily log, usually in a Friday catch-up session. Roughly 4 in 10 days have no log at all.	A Teams-based bot superintendents talk to for 60-90 seconds at day's end. It transcribes the update and structures it into a standard log — crew count, work completed, delays, materials, safety notes — filed automatically. Anything needing attention is flagged.

~2-3 hrs/wk	Week 1
reclaimed	live by

2. Client Update Automation

TODAY	RECOMMENDED
Clients call or text project managers directly whenever they want a status check — 8 to 10 times a week, unscheduled, often repeating the same information.	Once field reports are structured (#1), a weekly update draft is generated automatically from that data plus the project schedule. A PM reviews it, adds a note if needed, and sends — under five minutes.

~1-2 hrs/wk	Week 1
reclaimed	live by

3. Subcontractor Compliance Tracking

TODAY	RECOMMENDED
COIs, W-9s, and licenses live in a shared spreadsheet. The office manager manually checks expiration dates and chases subs by email — and it's easy for something to slip through.	A tracker that watches expiration dates, sends automatic renewal requests to subs, and flags anyone without current paperwork before they're dispatched to a job site.

~2–3 hrs/wk	Week 2
reclaimed	live by

4. RFI & Submittal Tracking

TODAY	RECOMMENDED
RFIs are sent and tracked entirely over email threads. Two recent project delays traced directly back to responses that got lost in someone's inbox.	A structured RFI and submittal workflow with automatic reminders to architects and subs on anything overdue, plus a single dashboard showing every open item across active jobs.

2 delays	Week 2
traced to this in 2025	live by

04 Getting to Launch

Roughly two weeks from kickoff to having the first few workflows live — but the exact path depends on a few things we sort out together early on: how you want things hosted, who's the right point of contact on your team to liaise with, and which workflow makes the most sense to tackle first given what's on your plate. The shape below is typical, not a fixed script.

Phase	What happens
Week 1 Setup & first workflow	Confirm hosting and access — whose tenant this lives in, and who's the internal point of contact for the rollout. Agree on which workflow goes live first. For Ridgeline that's Daily Field Reports, since it unlocks Client Update Automation right behind it. Configure that workflow and test it with a small group — a couple of superintendents on one active job — before it goes any wider.
Week 2 Rollout & next workflows	Expand the first workflow to the full team, adjusting based on what the pilot group ran into. Configure and launch the next one or two workflows — pace depends on how Week 1 went and what the team can absorb. Walk through everything that's live together, and map out where Phase 2 (AP coding, AI-assisted estimating) fits once the dust settles.

05 What Happens Next

This report is the starting point, not the finish line. Here's how it plays out from here:

- We walk through every recommendation on a live 30-minute call — you leave with a confirmed first move, not a document to interpret alone.
- The two-week plan above kicks off immediately after that call, with no separate onboarding process.
- Phase 2 opportunities (AP automation, AI-assisted estimating) are revisited once the first four are running and the team has a feel for how this works.

toodlebox

Governed AI infrastructure for small and mid-sized businesses.