PROMPT WORKS STUDIO

Chaos to calm, built to be yours.

Holberton Street Building

Workflow Audit

Prepared for Luke Dawlish, Owner

Chad Maxwell · Prompt Works Studio · Toowoomba

October 2026

> **A made-up example.** Holberton Street Building and its people aren't real. The software, prices, rules and pay rates in it are, as read on the dates shown.

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About me and this Audit

Who I am. I'm Chad, and I help small businesses work out where AI fits. I run my own business on Claude, so I've learned firsthand what it does well and where it needs someone checking.

What this Audit is for. To show you, job by job, what AI can take off your plate, what it can do with a person checking, and what should stay with your people. It's information for you to decide with.

How I work.

- You deal with me, start to finish.
- Privacy's part of every job. Customer details only go into tools you've approved.
- A person in your business checks everything AI does before it goes out.
- I'll tell you when the answer is not yet, or not AI at all.
- I'll show you the options I find, including ones that aren't mine. You choose.
- I only take on a Build that pays for itself within 12 months, counted job by job, with your time costed at the award minimum so the saving isn't overstated.
- When I report on the AI tools your people use, I name the tools and the jobs. I don't say who uses what.
- The report is yours. Take it to anyone you like.
- It's drafted with AI, and checked and signed off by me.

Summary

What I did. Half a day at your office on Tuesday 27 October. I sat with you and Kerry (office manager), watched you write up one quote, went through a week of subbies' claims and variations with Kerry, and spent 15 minutes with Josh on site.

Your data and who checks. Once your AI use policy's in place (section 9), customer details only go into tools it approves. Everything AI drafts is checked by you or Kerry before it goes to a customer or a subbie.

What I found.

- **About 16 hours a week go on the four jobs I looked at.** Quotes are 9 of them, mostly yours, at night.
- **Customers' names, addresses and site photos are going into a free AI tool on a personal phone.** The privacy regulator recommends against that.
- **Subbies' claims come in three different ways, and nothing tracks the payment schedule deadline.** Miss it and you can owe the whole amount claimed, and face a fine and possible action on your licence.
- **Most variations are agreed by text and written up later, some after the work's started.** Queensland's building law wants them agreed in writing first.
- **What you already pay for covers more than you're using.** Xero can chase your invoices and read your subbies' bills, and Buildxact can save your repeat jobs as recipes.
- **Your mail and accounts have 6 gaps** (the page before section 10). Your domain name is held by someone else, and that comes first.

Fix now (section 7). Stop customer details going into the free tool. Put every subbie claim in one place with its deadline in the diary. Use a variation form that's signed before the work starts. Write an AI use policy, name who's accountable for AI, and list the AI you use. None of it needs me.

Your options without me (section 8). The free fixes and switching on what you already have: about $311 of your time to set up, nothing a month, 2.25 to 3.75 hours a week back, worth $303 to $505 a month.

With me (section 10). A Build is me setting up a job in your own Claude account, testing it with you and training you on it. Only one job passes my 12-month rule, quotes: Claude drafts your scope of works from your site notes (typed or dictated on your phone) and photos, in your words, and you check every line and price. About $5,650 to start: $3,400 for the Build, the $1,500 Build fee (once per Build) less the $750 you paid for this Audit if you go ahead within 90 days, and $1,500 for Set-up (your Claude plan set up properly), plus about $78 a month for your own Claude plan. It gives you 3.5 to 4.5 hours a week back. The Build and Build fee ($4,150) pay for themselves in 7.9 to 10.6 months, inside my 12-month rule. I leave the Set-up out of that test, because it's a service you keep whether or not you build anything. With the free fixes for the other three jobs: 4.75 to 6.75 hours a week back, worth $562 to $831 a month after the plan. I wouldn't build the other three, since your own tools and the free fixes do them for less. The choice is yours.

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1. The firm today

People	5: Luke (owner, licensed builder), Kerry (office manager), Josh, Ben and Sean (carpenters)
Turnover	About $2.4 million last year
Work	About 40 jobs a year: bathrooms, kitchens, decks, extensions and renovations for homeowners, mostly $20,000 to $250,000, in Toowoomba and nearby. About 6 jobs on the go at once, and about 15 regular subbies (plumber, electrician, tiler, plasterer, painter, roofer, concreter, cabinet maker)
Software	Buildxact (Foundation plan) for estimates and quote letters, Xero, Microsoft 365 (Outlook), phones for photos and texts
Busiest time	February to November. Quotes stack up after Easter and before Christmas

Your goal for the Audit, in your words: "Get my nights back from quoting, and stop worrying I've missed something with the subbies."

2. AI already in use

You agreed I could ask about AI use on my own with each person. As agreed, this section names tools and jobs. It doesn't say who uses what.

Tool	Paid for by the firm?	Used for	Customer details going in?
ChatGPT, free version, on a personal phone	No	Turning site notes into the scope of works for quotes, and wording variation texts	Yes: names, addresses, and photos of the inside of customers' homes
Blu Recipe Assistant, built into Buildxact	Included in your plan	Not used yet. It's for estimating repeat jobs	None yet
JAX, Xero's AI assistant	Included	Not used yet. It can draft an invoice for you by text or WhatsApp	It would, inside Xero

Nobody was doing anything they thought was wrong. The free tool was just the easiest thing to hand at 9 at night. But the free version isn't set up for customer information, and the firm doesn't know what's been put into it.

The AI built into Buildxact and Xero counts too. The National AI Centre suggests listing it alongside anything you add yourself (section 3).

Where your software keeps your data, from each maker's own pages: Buildxact on Microsoft's Azure cloud (it doesn't say which country), Xero doesn't say on its security page.

3. What the rules and guidance say, and what I saw

The QBCC and the trade bodies don't seem to have put out any guidance on AI yet, so this section sets out the general rules that already apply to your paperwork, and the privacy and government guidance

on AI, next to what I saw on the day. **It isn't legal advice.** For what it means for your business, talk to your own adviser, the QBCC, or Master Builders.

Rule or guidance	What it asks for, in short	What I saw
Queensland Building and Construction Commission Act 1991 (QBCC Act), schedule 1B, sections 40 and 41 (variations)	Before the work starts, the homeowner agrees the variation in writing. The written variation says what changes, the date it was asked for, any delay, the change in price, and when it's paid. They get a copy within 5 business days, or before the work starts if that's sooner.	About 3 variations a week. Most are agreed by text on site and written up later. Two last month were written up after the work was done.
Building Industry Fairness (Security of Payment) Act 2017, section 76, and the QBCC's page on responding to a payment claim (last published 31 August 2021)	If you won't pay a claim in full by the due date, you give a payment schedule within 15 business days, or sooner if your contract says, with the amount and every reason for paying less. A subbie's invoice can count as a claim. Miss it and you can owe the whole amount, face a fine of up to 100 penalty units (a penalty unit is a dollar amount set by the state), and possible QBCC action on your licence.	About 12 claims a week, by email to Kerry, email to you, and text. No list of claims or deadlines. One schedule last quarter went out on day 14.
BIF Act, section 61	The payment claim rules don't cover your own contract with a homeowner who lives in the home. They do cover your contracts with your subbies.	Your invoices to homeowners who live in the home follow the QBCC Act's rules instead (job 4). On an investor's or landlord's job, your own invoices are payment claims under this Act too.
OAIC (privacy regulator), small business	Most businesses with a turnover of $3 million or less aren't covered by the Privacy Act. Some are, whatever their size.	Your turnover is under $3 million and none of the listed cases fit, so you're probably not covered. Check with your adviser.
Privacy Act, statutory tort for serious invasions of privacy, from 10 June 2025	People can sue over a serious invasion of their privacy, and it reaches past the businesses the Privacy Act covers.	Photos of the inside of customers' homes are on a personal phone and in a free AI tool.
OAIC, guidance on commercially available AI products, 21 October 2024, updated 17 January 2025	As good practice, keep personal information out of publicly available AI tools.	Customer names, addresses and photos in the free tool.
OAIC, automated decisions in privacy policies, from 10 December 2026	A business under the Privacy Act that uses personal information in automated decisions that could significantly affect someone's rights or interests must say so in its privacy policy.	Nothing in this report feeds a decision about a person.
National AI Centre, Guidance for AI adoption: foundations, first published October 2025 (current version 5 May 2026)	Someone accountable for AI. An AI policy. A register of the AI you use, including AI built into other software. Human checking matched to the stakes.	No one's named, there's no policy, and there's no list.

The good news: none of this is hard to put right. Section 7 lists what to do.

4. The jobs and hours now

Hours are a typical week in your busy months. You checked and signed off these figures on the day.

Job	Hours a week	Who does it	How I timed it
1. Quotes after a site visit (3 a week)	9	Luke 7.5, Kerry 1.5	Watched one (2.5 hours), and your estimate
2. Variations in writing (3 a week)	1.5	Luke, Kerry	Your records (Outlook)
3. Subbies' progress claims (12 a week)	3	Kerry, Luke	Your records (a week of claims, gathered from email and texts)
4. Invoices and reminders (5 a week)	2.5	Kerry	Your records (Xero)
Total	**16**		

Signed: Luke Dawlish, 27 October 2026

5. The map

Each step of each job goes one of three ways:

- **Hand to AI:** AI drafts it. A person reads it before it goes anywhere.
- **Hand over with a check:** AI does the work, and a named person checks it against the source every time. The checking time is shown, and it's already taken off the hours back.
- **Keep human:** a person does it. AI doesn't touch it.

Job and step	Where it goes	Why
1. Quotes: measuring up, photos, and talking budget and access with the customer	**Keep human**	See section 6.
1. Quotes: the takeoff, prices, margin, prime cost items and provisional sums	**Keep human**	See section 6. Your price, in Buildxact.
1. Quotes: scope of works, inclusions and exclusions, from your notes and photos	Hand over with a check, about 20 minutes a quote	Drafted in your words. You check every line against what you saw on site. No customer details in public tools (OAIC).
1. Quotes: asking subbies for their prices	Hand to AI	Drafting from the scope. Kerry sends.
1. Quotes: the follow-up a week after the quote goes	Hand to AI	Drafting. Kerry sends.
2. Variations: pricing the change and agreeing it with the homeowner	**Keep human**	See section 6.
2. Variations: writing it up with what the Act asks for, and the email asking for their written okay	Hand over with a check, about 10 minutes a variation	Kerry checks it against the contract and your price, and you sign off each one. The work waits for their written okay (QBCC Act).
3. Claims: logging each claim the day it arrives, and working out the last day for a schedule	Hand over with a check, about 30 minutes a week	Kerry checks every date against the claim and the subcontract. A missed date costs money (BIF Act).

Job and step	Where it goes	Why
3. Claims: checking the work's been done	**Keep human**	You or Josh, on site.
3. Claims: deciding what to pay, and keeping the deadline	**Keep human**	See section 6.
3. Claims: drafting the schedule from your reasons	Hand over with a check, about 15 minutes a schedule	You check and sign off the amount and every reason, and you send it (BIF Act).
4. Invoices: the progress claim to the homeowner when a stage is reached	Hand over with a check, about 15 minutes a week	Kerry checks it against the contract stages and the agreed variations, and you sign off each one (QBCC Act).
4. Invoices: reminders when one's overdue	**Keep human**	Not AI: Xero's automatic reminders go on the timing Kerry sets, and she switches them off for anyone she's talking to (section 8).

6. What stays human, and why

- **Your price.** The takeoff, the margin, prime cost items and provisional sums are your judgement and your name on the contract.
- **Agreeing a variation's price with the homeowner.** It's a conversation, and it's your contract.
- **Deciding what to pay a subbie, and keeping the deadline.** The duty and the penalty are yours. AI can log claims and draft schedules, but you decide what's paid and you send it.
- **Checking work's been done before a claim's paid.** Only someone on site can.
- **Any sign-off that's a licensed person's to give,** like plumbing, gas or electrical work. It's theirs under their licence.
- **Access codes, alarm codes and key safe numbers.** They stay in your job system, out of any AI tool, Blu included. That's how I set things up for every trade business.
- **Photos of the inside of customers' homes, beyond what the job needs.** Same reason.

These stay human for good.

7. Fix now

These are risks, so they don't wait for a choice between options. Each one comes from section 3. None of them needs anything from me.

What to do	Why	Rule or guidance
Stop customer details and site photos going into the free AI tool	The free version isn't set up for customer information	OAIC, Privacy Act tort
Send every subbie claim to one email address, and keep a list: the date it came in, the last day for a payment schedule (15 business days, or sooner if the subcontract says), and the due date. Put the last day in a shared diary	Claims come three ways and nothing tracks the deadline	BIF Act, QBCC
Use your contract's variation form (or one with the Act's headings) every time, on your phone, and get the homeowner's written okay before the work starts	Variations agreed by text and written up later	QBCC Act

What to do	Why	Rule or guidance
Put a written AI use policy in place. Write your own from section 3, or use any provider's	You don't have one, and it's the base for everything else	National AI Centre
Name who's accountable for AI (you), and list the AI you use, including Blu and JAX	No one's named and there's no list	National AI Centre

8. Your options

For each job I've set out the options I found that don't involve me: what each does, what it costs, and how many hours a week it gives back after checking. What I'd do is in section 10, kept apart so you can weigh these on their own.

How I worked out the figures. I didn't ask what anyone's paid. I cost the time at the award minimum for the role. Kerry is full-time office staff under the Clerks award, Level 3, since she does specialised work to general guidance, with some judgement of her own: $31.11 an hour at the minimum rate. Your carpenters are tradespeople under the Building and Construction General On-site Award 2020, CW3 on weekly hire, which is $31.95 an hour once the residential industry and tool allowances are counted. You're the owner with no award rate, so all of it is costed at Kerry's rate, the lowest award rate in your firm. So these are the least the time is worth.

Check any figure yourself, or any quote you get. Months to pay back = cost to start ÷ (hours back a week × $31.11 × 4.33 weeks, less any cost a month).

Hours back are my estimates from what I saw, after checking time is taken off. "Hours still spent" is what the job still takes each week with that option in place. Prices are from each maker's own page on 31 October 2026.

These are the options I found. There may be others. I looked at what Buildxact and Xero already do, the makers' own price pages, and products made for builders.

Buildxact Pro comes up in three jobs. You're on Foundation ($199 a month before GST). Pro is $399 before GST, so moving up costs $220 a month more with GST. It adds variations ("change orders"), a client portal, invoicing, the Xero link, requests for quotes to subbies, and Blu's Estimate Generator. Jobs 2 and 4 show Pro on its own, and the line under the total shows it across all three. For job 1, the cheaper way to Blu's Estimate Generator is the add-on on your own plan.

Job 1. Quotes after a site visit (9 hours a week)

How it runs now. The enquiry comes in by phone or the website, and Kerry books a site visit. You measure up, take photos and notes, and talk budget, access and what's in and out. Back home, at night, you do the takeoff and estimate in Buildxact from your supplier prices and labour, add your margin, prime cost items and provisional sums, and ask the subbies for their prices. Then you write the scope of works, inclusions and exclusions in the quote letter. Each quote takes about 2.5 hours of your time, 3 or so a week, and about 1.5 hours of each is that write-up. Kerry sends it and follows up a week later. If they say yes, anything over $3,300 needs a written contract, a signed copy to them within 5 business days, and the home warranty premium paid to the QBCC. Most of your jobs are $20,000 or more, which

adds more steps. They get the Consumer Building Guide before they sign, the deposit is no more than 5%, and they get a commencement notice within 10 business days of starting on site.

	Fix without AI	What you already have: Buildxact Foundation	Blu Estimate Generator, add-on to Foundation
What it does	A site-visit checklist, and your standard scope paragraphs saved as quote letter templates, so each quote starts from a template	Blu Recipe Assistant, for estimating repeat jobs (a deck, a bathroom), and quote letters that start from your templates	Starts an estimate from a description of the job in your own words, for you to edit
What's left for your staff	Writing each job's own scope, and every price	Writing each job's own scope, and pricing what's different	Checking the estimate line by line, writing the scope, and every price
Setting it up (my estimate)	About 5 hours: the checklist and the templates	About 4 hours: recipes for your five most common jobs	About 4 hours: trying it on past jobs
Where customer details are kept	Buildxact, as now	Buildxact, as now	Buildxact, as now
Who checks	You, as now	You check each recipe's items and prices before it goes in a quote	You check every line Blu puts in. Buildxact says Blu "stays under your supervision"
Limits	Every renovation's different, so the template's a start	Recipes help repeat jobs, less so a one-off extension	It starts the estimate. The scope in your words still needs writing
Cost to start	$156 (5 hours of time)	$124 (4 hours)	$124 (4 hours)
Cost a month	Nothing	Nothing (in your plan)	$108.90 ($99 plus GST). It comes with Pro, if you move up for jobs 2 and 4
Hours back a week (my estimate)	1 to 1.5	0.75 to 1.25	1 to 1.5
Hours still spent a week	7.5 to 8	7.75 to 8.25	7.5 to 8
Saves a month, after costs	$135 to $202	$101 to $168	$26 to $93
Pays back in	About a month	About a month	1.3 to 4.8 months

Many service trades use a job app that quotes, invoices and chases in one place, each with its own AI help. ServiceM8 (free to $349 a month for the whole business, with GST) has its AI Writing Helper. Tradify has SmartWrite on its Plus plan ($62 a user a month before GST). Fergus Assistant can build quotes and draft customer messages. They suit lots of small jobs. For a builder quoting from plans and takeoffs, Buildxact is the closer fit, so I've kept to it.

What I'd take from this: a template or recipes give you about an hour a week back, for a few hours' set-up. The scope write-up is still yours every night, and that's the part AI could take (section 10).

Job 2. Variations in writing (1.5 hours a week)

How it runs now. The homeowner asks for a change on site, or you find something behind a wall. You price it, often on the spot, and agree it with them. The Act wants it written up with what changes, the date they asked, any delay, the new price and when it's paid, agreed by them in writing before the work starts, with a copy to them within 5 business days. Then it goes on the next progress claim. Here it's mostly agreed by text and written up by Kerry later, about 30 minutes each, 3 a week.

	Fix without AI	What you already have: Outlook	Buildxact Pro
What it does	The variation form that comes with your contract (or one with the Act's headings), kept on your phone, filled in and signed on site every time, photo to Kerry	A saved Outlook email asking the homeowner to reply "I agree" to the attached variation. Foundation has no variations	Variations ("change orders") in Buildxact, the homeowner's okay tracked in the client portal, and the change carried into the next invoice
What's left for your staff	Filling in the form, and Kerry filing it	Writing each variation, and keeping track of who's agreed	Writing each variation and pricing it
Setting it up (my estimate)	About 2 hours	About 1 hour	About 2 hours
Where customer details are kept	Your phone and Outlook	Outlook	Buildxact
Who checks	You, before the work starts	Kerry checks the okay's in before the work starts	Kerry checks the okay's in before the work starts
Limits	Needs signing every time, even when it's raining	Replies still have to be matched to jobs	Check with your adviser that the portal's okay meets "agrees in writing"
Cost to start	$62 (2 hours)	$31 (1 hour)	$62 (2 hours)
Cost a month	Nothing	Nothing	$220 more than Foundation, or nothing more if you've moved up for job 4
Hours back a week (my estimate)	0.25 to 0.5	0.25	0.5 to 0.75
Hours still spent a week	1 to 1.25	1.25	0.75 to 1
Saves a month, after costs	$34 to $67	$34	Costs $119 to $153 a month more than it saves, on its own
Pays back in	1 to 2 months	About a month	Doesn't, on its own

What I'd take from this: the form fixes the risk for two hours' set-up. The hours are small whichever way you go.

Job 3. Answering subbies' progress claims (3 hours a week)

How it runs now. A subbie sends a claim, usually as an invoice by email, sometimes by text. An invoice can count as a payment claim. Kerry matches it to their quote and the job, and you or Josh check the work's done. If you'll pay it all by the due date (the subcontract's date, which can't be more than 25

business days, or 10 business days if it doesn't say), you just pay. If not, you give a payment schedule within 15 business days, or sooner if the subcontract says, with the amount and every reason for paying less, and pay that amount by the due date. Business days here skip weekends, public holidays, and 22 to 24 December, 27 to 31 December and 2 to 10 January, so a claim that lands before Christmas has a later deadline than the calendar suggests. About 12 claims a week, 10 minutes each for Kerry and an hour a week for you, and one or two schedules a month.

	Fix without AI: one inbox and a claims list	What you already have: Xero bills	Payapps
What it does	Every claim to one email address, logged in a list with the date in, the last day for a schedule and the due date, and the last day in a shared diary	Forward each claim to Xero, and Xero's AI reads it and makes a draft bill for Kerry to approve, with a planned payment date	Subbies submit their claims in one format, and you assess, approve and track them in one place
What's left for your staff	Logging, working out the dates, matching, and writing any schedule	Working out the schedule date, matching, and writing any schedule	Assessing each claim and writing any schedule
Setting it up (my estimate)	About 4 hours: the inbox, the list, and telling your subbies	About 2 hours: Xero's bills email address, and telling your subbies	Quoted with the plan, and each subbie has to sign up
Where customer details are kept	Outlook and your list	Xero	Payapps (where it's hosted isn't on the pages I read)
Who checks	Kerry checks every date. You decide what's paid	Kerry checks each draft bill against the claim. You decide what's paid	You decide what's paid
Limits	Only as good as the logging	Xero doesn't track the schedule deadline, so you still need the list in section 7	Made for bigger builders. Your subbies pay $65 a claim or a plan ($49 to $440 a month, GST not stated) unless they self-manage, which gets them their first claim free each month
Cost to start	$124 (4 hours)	$62 (2 hours)	Quoted
Cost a month	Nothing	Nothing (check your Xero plan has it)	Quoted
Hours back a week (my estimate)	0.5 to 0.75	0.5 to 1	1 to 1.5, if every subbie used it
Hours still spent a week	2.25 to 2.5	2 to 2.5	1.5 to 2
Saves a month, after costs	$67 to $101	$67 to $135	Can't say until it's quoted
Pays back in	1 to 2 months	Under a month	Can't say until it's quoted

None of the job apps I checked (Buildxact, ServiceM8, Tradify, Fergus) showed a way to log a subbie's claim with its payment schedule deadline. Their pages only cover supplier bills.

What I'd take from this: the claims list is the one that matters, because it keeps you inside the deadline. Forwarding claims to Xero gives you a little time back on top.

Job 4. Invoices and the reminders after (2.5 hours a week)

How it runs now. The payment stages are set in the contract. The deposit stays inside the cap, and each progress claim has to match the work done and be in proportion to its value. When you tell Kerry a stage is reached, she raises the claim in Xero, adds any agreed variations, and sends it. Then she follows up the late ones by phone and email. About 5 a week, 30 minutes each with the chasing.

	Fix without AI	What you already have: Xero	Buildxact Pro
What it does	A stage list for each job from the contract, and the claim raised the day a stage is reached	Automated reminders before and after the due date, which you haven't switched on. JAX can draft an invoice from a text	Progress invoices from the job, with agreed variations shown against the old price, sent to Xero
What's left for your staff	Raising each claim, and chasing	Raising each claim, and the calls when reminders don't work	Checking each invoice, and the calls
Setting it up (my estimate)	About 2 hours	About 1 hour: reminder timing and wording	About 2 hours
Where customer details are kept	Xero, as now	Xero, as now	Buildxact and Xero
Who checks	Kerry, against the contract	Kerry, against the contract	Kerry, against the contract
Limits	Kerry still chases by hand	Reminders go to everyone overdue, so turn them off for anyone you're talking to	Means moving invoicing into Buildxact
Cost to start	$62 (2 hours)	$31 (1 hour)	$62 (2 hours)
Cost a month	Nothing	Nothing (check your Xero plan has them)	$220 more than Foundation, or nothing more if you've moved up for job 2
Hours back a week (my estimate)	0.25 to 0.5	0.5 to 0.75	0.75 to 1
Hours still spent a week	2 to 2.25	1.75 to 2	1.5 to 1.75
Saves a month, after costs	$34 to $67	$67 to $101	Costs $85 to $119 a month more than it saves, on its own
Pays back in	1 to 2 months	Under a month	Doesn't, on its own

What I'd take from this: switch on Xero's reminders this week. They take most of the chasing off Kerry, and they come with Xero (check your plan has them).

All four jobs, without me

If you took the option that saves you the most each month for each job, this is the total. The claims list in section 7 is on top of this, for the deadline.

	1. Quotes	2. Variations	3. Claims	4. Invoices	Total
Option	Fix without AI	Fix without AI	Xero bills	Xero reminders	
Cost to start	$156	$62	$62	$31	**$311**
Cost a month	Nothing	Nothing	Nothing	Nothing	**Nothing**
Hours back a week (my estimate)	1 to 1.5	0.25 to 0.5	0.5 to 1	0.5 to 0.75	**2.25 to 3.75**
Hours still spent a week	7.5 to 8	1 to 1.25	2 to 2.5	1.75 to 2	**12.25 to 13.75**
Saves a month, after costs	$135 to $202	$34 to $67	$67 to $135	$67 to $101	**$303 to $505**

Buildxact Pro across jobs 1, 2 and 4 (on job 1, Blu and requests for quotes, which I'd put at 1.25 to 2 hours back) gives back 2.5 to 3.75 hours a week, which is $117 to $285 a month after its $220. That's less than the free fixes save, so it isn't in the total. If you want variations and invoices in one place, it's still worth a look.

The four jobs take 16 hours a week now. Without me, 12.25 to 13.75 of those hours are still spent each week, most of them on quotes.

9. Policy and staff

You need a written AI use policy (section 7). For a building firm it should cover:

- what can and can't go into AI tools (never access codes, alarm codes or key safe numbers, and only the site photos a job needs)
- which tools the firm has approved
- who checks AI work before it goes to a customer or a subbie, and how that's recorded
- who's accountable (you)

Staff. Everyone I spoke to was keen, and nobody had been shown how to use AI safely. A short session once the policy's in place would cover what's allowed, how to check AI work, and where customer details can and can't go. The carpenters only need the part about photos and codes.

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Your mail and accounts

Your email, your domain name and who can get into them sit under everything else in this report, so they get a page of their own. Your domain's public records were read from outside. On the day, the office manager logged in and we went through the admin screens together. I didn't log in or take a password, nothing was changed, and no customer's mail or files were opened.

What I looked at	What I found	Where it stands
Your domain name	It's in the name of whoever built your website, and they hold the login. You'd need it handed over to change the records below	Ask for it
Where your mail goes	To Microsoft 365, on your own domain	OK
Proof your mail is really from you	SPF is right. DKIM is off and there's no DMARC record, so it's harder for other mail systems to tell your mail from a fake	Gaps 1 and 2
Other things that send as you	We didn't find anything else sending with your address on the day	OK
Who looks after your mail	Nobody outside the business. You signed up direct, so the account is yours	OK
Plan and licences	Business Standard, two licences, both in use. The carpenters don't have one	OK
Getting back in	One admin account, and it's also someone's everyday account. If it's locked, there's no second one to get back in with	Gaps 3 and 4
Two-step sign-in	Microsoft's security defaults are off	Gap 5
Mail protection	The built-in protection is on. Microsoft's Standard settings, a tighter set against spam, malware and phishing, are off	Gap 6
Mail forwarded out	Set to Off, so automatic forwarding outside the business is blocked	OK
One login a person	One account a person. Nobody said they share a login	OK
People who've left	No old accounts can sign in. The steps for when someone leaves are written down	OK
Where the screen says your data sits	Australia. That's as far as this page goes	Noted
Backup	Nothing keeps a copy of your mail outside Microsoft	Your call

What this means for your security. Microsoft's own list for a small business starts with two-step sign-in and looking after admin accounts. Gaps 3 to 5 are those two. Your mail goes out under that domain name, so having it handed over is worth doing first. I can't do that part: it's between you, them and the company it's registered with. Keeping a copy of your mail is your call. I haven't picked a backup product, so I don't recommend one.

What I didn't look at. Your computers, phones, network, antivirus, firewall, files and folders. This isn't a security audit, and a clean row doesn't mean nothing can go wrong.

What I can't do. I don't work on a domain or account someone else holds, or on the things I didn't look at. If you think someone's already got into your accounts, you need an IT security firm. I'm not one.

What it costs to close these: with a real report, a separate quote comes with it. You don't need me for any of them. This page is yours, so you can take it to anyone you like, including an IT provider.

10. What I can do for you

This is what doing it with me would look like: the jobs built in your own Claude account, as one Build. A Build is me setting up a job in Claude, testing it with you and training your people on it. Each job is priced by its Tier, 1 to 3. Drafting, summarising or pulling details out of documents starts at Tier 1. A job goes up one Tier if what it produces carries a figure someone relies on, and one more if it sits near a legal duty. Customers' details get their own safeguards on every Tier. All prices include GST.

- **Quotes, Tier 1:** it drafts the scope in words. Your prices stay yours in Buildxact.
- **Variations, Tier 3:** each one carries a price change, and the QBCC Act sets what it must say.
- **Claims, Tier 3:** it reads claim amounts and dates, and it sits next to the BIF Act's payment schedule duty.
- **Invoices, Tier 3:** each progress claim carries an amount, and the QBCC Act says it has to match the work done.

My solution, job by job

	1. Quotes	2. Variations	3. Claims	4. Invoices
What Claude does	When you start it, drafts the scope of works, inclusions and exclusions from your site notes (typed or dictated on your phone) and your photos, under a job number with no names or addresses, in your words, ready to paste into the Buildxact quote letter. Drafts the price requests to subbies and the follow-up	When Kerry starts it, drafts the variation with the Act's headings from your text message notes, and the email asking for the homeowner's written okay	When Kerry starts it each morning, reads the claims inbox through Microsoft 365, logs each claim, works out the last day for a schedule (skipping the days the Act leaves out) for Kerry to put in the diary, and drafts the schedule from your reasons	When Kerry starts it, drafts the progress claim from the contract stages and the agreed variations
Who checks	You check every line against what you saw on site. Prices stay yours, in Buildxact	Kerry checks it against the contract and your price, and you sign off every variation before it goes	Kerry checks every date. You decide what's paid and sign off every schedule before it goes	Kerry checks it against the contract, and you sign off every claim before it goes
Build	$3,400 (Tier 1)	$5,500 (Tier 3)	$5,500 (Tier 3)	$5,500 (Tier 3)
Hours back a week (my estimate)	3.5 to 4.5	0.5 to 0.75	1 to 1.5	0.5 to 0.75
Hours still spent a week	4.5 to 5.5	0.75 to 1	1.5 to 2	1.75 to 2

Customer details stay in your firm's own Claude account, apart from what's below. Access codes never go in. I build it with you, train you and Kerry on it, come back for a short follow-up session two to three

weeks after go-live, answer your questions free for 30 days, and check in at 3, 6 and 12 months. All of that is in the Build price.

What a Build needs

A Build runs in a Claude plan in your firm's name, paid to Anthropic on top of my prices, under Anthropic's business terms. For a firm your size that's the Team plan: at least two seats, US$25 a seat a month billed monthly, with tax added at billing. I couldn't find an Australian price on Anthropic's pages. Two seats come to about $71 a month before tax at the 30 October exchange rate, about $78 with GST on top, and that's the figure below. One seat is yours and one is Kerry's, and both are covered by the Build price (I only charge $150 a job for each seat past two). Because these jobs handle your customers' and subbies' details, each runs on that Team plan, and you or Kerry start every run. It can run in a Claude chat, in Cowork or in Claude Code, and I'll pick whichever suits the job. In Cowork I set it to stop and ask before each action. Nothing runs on its own on a schedule unless the names are taken out first.

Why a business plan rather than a free or Pro one: on the Free, Pro and Max plans, Anthropic may use what you type to train its models unless each person turns that off in their own settings. On Team and Enterprise it doesn't, by default.

You don't have a Claude plan now (section 2). Setting one up properly, with the privacy settings, your firm's details and your AI use policy inside it, is my Set-up and Onboarding service: $1,500 for a firm of 1 to 5 people. It's in the totals below, but not in the 12-month test, since you keep it whether or not you build anything.

Where your customers' details go

A common worry is customers' details going off to a server overseas, so here's the straight answer. Claude runs on Anthropic's servers in the United States and other countries, and anything the Build reads is processed there. On a Team plan, Anthropic doesn't use it to train its models by default, and your firm controls the account. Your customers' details don't come to me: I work inside your account with you or Kerry present, and my data handling addendum, which comes with the Build agreement, sets out what can reach me (at most, file names in the reports you send me, and only if you choose that, and those can carry your customers' names) and what never does. If the Privacy Act covers you (section 3), your privacy policy has to say that personal information goes overseas. Before a Build starts, I sit with you and read Anthropic's terms for your plan, so the decision to put customer details in is yours, made with the terms in front of you.

Your mail and accounts. With a real report, a separate quote for any gaps I can close comes with it. None of it counts in the 12-month test or the totals below.

Each job, counted on its own

I only take on a Build that pays for itself within 12 months, counted job by job.

Quotes on its own. If quotes is the only job, the test counts the $3,400 Build and the $1,500 Build fee less your $750 Audit fee: $4,150, and the $78 a month plan. It saves $393 to $528 a month and pays back in 7.9 to 10.6 months, so it passes. With the $1,500 Set-up, everything you'd pay up front is $5,650.

The test for all four. To see which jobs could ever pass, I give each job its Build price plus a quarter of the Build fee less the Audit fee, and a quarter of the Claude plan. These figures are only the test. They aren't what any one job would cost you.

Job	Cost in the test	Saves a month, after plan share	Pays back in
1. Quotes	$3,587.50	$452 to $587	6.1 to 7.9 months
2. Variations	$5,687.50	$48 to $81	69.8 to 118.9 months
3. Claims	$5,687.50	$115 to $183	31.2 to 49.4 months
4. Invoices	$5,687.50	$48 to $81	69.8 to 118.9 months

Only quotes passes. Variations and invoices are small jobs that your own tools and a form already cover. Claims needs the most checking, and the list in section 7 does the part that matters. I won't take those three on.

These are the least the time is worth, at the award minimum. If your people are paid more than that, every job pays back sooner than shown.

The totals side by side

	All four jobs, without me (section 8)	All four jobs, with me	Quotes with me, the rest without me
Cost to start	$311	$22,150: four Builds ($19,900), one Build fee ($1,500) less the $750 Audit fee, and Set-up ($1,500)	$5,806: the quotes Build, Build fee less Audit fee, Set-up, and $156 of fixes for jobs 2 to 4
Cost a month	Nothing	$78 (Claude Team, two seats)	$78 (Claude Team, two seats)
Hours back a week (my estimate)	2.25 to 3.75	5.5 to 7.5	4.75 to 6.75
Hours still spent a week (of 16 now)	12.25 to 13.75	8.5 to 10.5	9.25 to 11.25
Saves a month, after costs	$303 to $505	$663 to $932	$562 to $831
Pays back in	About a month	23.8 to 33.4 months	7 to 10.3 months
Catches up with "without me" after		51.1 to 60.7 months	16.9 to 21.2 months
Ahead after three years, after all costs	$10,600 to $17,874	$1,709 to $11,408	$14,417 to $24,116

"Catches up" is when the total saved with me passes the total saved without me. The middle column shows the whole picture, but I wouldn't take on variations, claims or invoices. All three columns are at the award minimum, and none counts what freed hours are worth if they go on quoting more work.

Prices

A Build, per job	$3,400 (Tier 1), $4,200 (Tier 2) or $5,500 (Tier 3), with follow-up, 30 days of questions and check-ins
Build fee	$1,500, once per Build, however many jobs are in it
The Audit fee	$750 comes off the Build fee if you go ahead within 90 days of this report
Set-up and Onboarding	$1,500 for 1 to 5 people: your Claude plan set up properly
An AI use policy on its own	$750. Any provider's will do, or you can write your own
Monthly tune-up (optional)	$750 a month, for up to 4 hours of checks and fixes to what's built

To start, reply to this report or call me, and we'll go through it together.

In 30 days I'll book a 20-minute call: what you've done, what's stuck. It's part of the Audit, whatever you choose.

This report is yours. Keep it, share it, take it to any provider.

It was drafted with AI (Claude) from my notes on the day, then checked and finalised by Chad Maxwell.