

Housecall Pro

VIRTUAL SUMMIT 2025

The real dirt on building a year-round business



with
MIKE ROWE

Build your 2026 Business Plan with AI

AI prompt pack worksheet



with Coach Morgan Knox
and Christopher Olson

Start here ▶▶▶▶▶

How to use this pack

You don't need perfect prompts. You just need a starting point.

3 simple rules:

- 1. Treat AI like a coach, not a robot.** Talk to it like you'd talk to a business partner.
- 2. Start broad, let AI ask questions.** Your first message can be messy. That's fine.
- 3. Use audio if you can.** Open your AI app, hit the mic, and talk. You think better out loud.

How to use these prompts

- Pick the section that matches what you're working on:
 - [Foundation](#)
 - [Money](#)
 - [Operations](#)
 - [Growth](#)
 - [Pulling it all together](#)
- Copy** the prompt.
- Paste** into your AI app of choice (ChatGPT, Claude, etc.).
- Fill in the blanks** in your own words.
- Hit "send"**. Answer the questions AI asks you.

Messy still counts. You can refine later.

If you're stuck: starter talking points

- *"I'm worried about my slow season..."*
- *"I think my pricing needs a reset..."*
- *"I'm thinking of hiring but I'm not sure when..."*
- *"I want to increase revenue but avoid chaos..."*
- *"I feel like I'm over-hiring in the office..."*
- *"I'm tired of feeling behind on cash flow..."*

You can literally say these into the mic and let AI guide you.

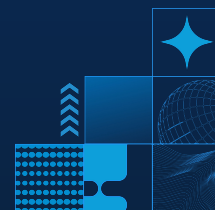
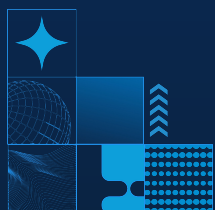


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Scan the QR code to connect
and claim your CSR AI discount
for Housecall Pro. >

Housecall Pro AI Team

AI that powers your business growth

Key benefits:

- ★ **Works nonstop**
Your AI Team answers calls, books jobs, and keeps your business running 24/7.
- ★ **Starts on day one**
Trained for the trades, the AI team syncs seamlessly with your jobs and tools.
- ★ **Automates your day**
Streamlines scheduling, reporting, and follow-ups to save hours and keep operations running smoothly.

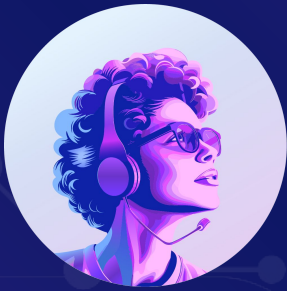
Features:

- 24/7 support across calls, analytics, marketing, and strategy
- Secure, reliable performance built directly into Housecall Pro—no extra apps required
- Learns from your business info to deliver better answers over time
- Accessible directly through Global Chat, your AI Team is always ready to keep work moving smoothly.

Pricing:

AI Team Included for all HCP Pros
(except **CSR AI** — available as a premium feature)

Meet the Housecall Pro AI Team:



CSR AI:

CSR AI answers every call and chat instantly booking jobs, capturing customer details, and providing support after hours so you never miss an opportunity. It references your service info, customer history, and more to deliver accurate, professional responses every time.



Analyst AI:

Analyst AI delivers real-time answers to help you understand where your business stands—tracking revenue, cash flow, and team performance while generating custom reports with no spreadsheets required.



Coach AI:

Coach AI gives you personalized recommendations and practical strategies for growth, pricing, and hiring—turning your business data into clear, actionable decisions that help you win more jobs and stay on track.



Marketing AI:

Marketing AI creates professional emails, campaigns, and service descriptions in seconds helping you reach more customers, boost bookings, and keep your marketing consistent and effortless.



Help AI:

Help AI gives you instant answers to “how-to” questions, guiding you through features, troubleshooting issues, and helping you find what you need in Housecall Pro without waiting on support.

Section 2

Foundation: Start your 2026 plan

1. Starter prompt

Help me build
my 2026 plan.

Use this first. It kicks off the whole conversation. **Copy, paste, tweak:**

I want to build my 2026 business plan using you as my AI coach.

My business is: [type of business, services, location].

My goals for next year include: [growth target, profit goals, work-life balance, etc.].

I'm struggling with: [cash flow / slow season / hiring / pricing / feeling overwhelmed / etc.].

Please ask me questions one at a time to understand my business and help me build a clear outline for my 2026 plan.

2. Outline builder

Turn my thoughts
into a plan.

Use this after you've had a bit of back-and-forth and dumped some context.

Based on everything we've discussed so far, please create a clear outline for my 2026 business plan.

Use sections like:

- Revenue & profitability
- Pricing
- Seasonality
- Capacity & hiring
- Operations & systems
- Marketing & demand generation
- KPIs & reporting cadence

For each section, list 3-7 bullet points of what we should cover. Then ask me which sections I want to work on first.

Section 3

Money: pricing, profit & cash flow

Before you use these

Export the following from your accounting system (if you can):

- **Profit & Loss** – by month (CSV)
- **Cash Flow** – by month (CSV)
- **Balance Sheet** – by month or YTD (CSV)
- [OPTIONAL]: **job-level report** with revenue, costs, and job type

CSV is best. If you can't get all of them, use what you have.

3. Financial inputs starter prompt

Analyze my numbers. ”

I'm going to upload some financial reports for you to review:

- Profit & Loss by month for the last [12/24] months
- Cash Flow by month
- Balance Sheet
- [Optional: job-level revenue/cost report]

Please analyze these and tell me what you see in terms of:

- seasonality (busy vs. slow months)
- revenue trends
- expense spikes
- gross margin changes
- cash flow risk points

Explain it in plain English like you're talking to a contractor, not an accountant. Then suggest 3–5 things I should look at more closely.

Money: pricing, profit & cash flow

4. Personal + business cash flow prompt

Connect my life to my numbers. ”

Use this to tie your personal needs into your business plan.

I want to connect my personal cash flow needs to my business plan.

Here are my personal numbers (rough is fine):

- My target take-home pay is about: \$[amount] per month.
- My household fixed costs are roughly: \$[amount] per month.
- Ideally, I'd like to set aside about: \$[amount] per month for savings, taxes, or debt paydown.

Using these targets and the financial reports I've uploaded, please:

- 1) Estimate how much revenue my business needs to produce per month and per year to support this in a healthy way.
- 2) Show me the rough number of jobs per month and the average ticket size needed.
- 3) Break this down by season if my business is seasonal.

Money: pricing, profit & cash flow



5. Pricing & margin check

Am I undercharging?

I want to review my pricing and margins.

Here is my price list and any cost information I have for each service:
[Paste your services, prices, and estimated costs if you have them.]

Using this and the financial data you've seen, please:

- 1) Identify any services that look underpriced based on cost and margin.
- 2) Suggest new price ranges or tiers for those services that would improve my margins without being unreasonable for my market.
- 3) Explain in simple terms why you're recommending those changes.

6. Cash flow forecast

Show me 2026 month by month.

Using the monthly revenue data from my Profit & Loss, I'd like you to build a simple forecast for 2026.

Please:

- 1) Create a baseline monthly revenue forecast for 2026 based on past seasonality.
- 2) Create a "stretch" scenario if I improve pricing and utilization.
- 3) Highlight which months are likely to be tight on cash and what I should watch for.
- 4) Suggest 3-5 ideas to stabilize cash flow across the year.

Money: pricing, profit & cash flow

7. Weekly financial scoreboard

Turn this sheet into a simple report. 🗨️

Each week I can export a simple report with:

- cash in
- cash out
- total jobs completed
- total revenue
- [any other columns you have]

I'm going to paste or upload one week of data now.

Please:

- 1) Summarize this week's numbers in plain English.
- 2) Tell me what looks good and what might be a concern.
- 3) Suggest 1-3 questions I should ask myself or my team based on this week's data.

After this, help me create a simple template I can reuse each week for a quick financial check-in.

Operations: capacity, hiring & performance

8. Capacity & growth check-in

Can we actually hit this goal? 🗨️

I want to sanity-check my 2026 revenue goal.

My target revenue for 2026 is: \$[amount].

Here is my current setup:

- Number of techs/crews: [number]
- Average ticket size: about \$[amount]
- Average jobs per day per crew: [number]
- Days per week we usually run: [number]
- Our slow season is usually: [months]
- Our busiest season is: [months]

Given this, please:

- 1) Estimate how much revenue my current team can realistically produce in 2026 if we run at a healthy, sustainable utilization.
- 2) Tell me what would need to improve (scheduling, job mix, pricing, etc.) to hit my target.
- 3) Explain at what point I would truly need to add another crew, truck, or office role, instead of just getting more efficient.

Operations: capacity, hiring & performance

9. Overhead & hiring guardrails

Should I really hire this role? ””

I'm thinking about hiring a new role and I want to know if it actually makes sense.

The role is: [title, e.g., office coordinator, ops manager, CSR, etc.].

Here's what I want this person to do day to day:
[bullet list of tasks]

Right now, these tasks take about: [hours per week] and are currently handled by: [who does them now].

Their estimated salary + benefits would be around: \$[amount] per year.

My main goals for 2026 are: [brief goals].

Based on this information:

- 1) Does hiring this role in 2026 make sense? Why or why not?
- 2) If yes, when would be the right time in the year to hire?
- 3) If no, what should I fix or improve first instead of hiring?
- 4) If I do hire, help me write a focused role description and a 30/60/90 day plan so this person creates clear value and doesn't just become overhead.

Operations: capacity, hiring & performance

10. Role scorecard

Define what good looks like. ”

I want to create a simple scorecard for this role:

Role: [e.g., field technician, crew lead, CSR, estimator, etc.]

In plain language, here's what I need this person to own and be good at:

[bullet list of responsibilities and behaviors, e.g., "shows up on time," "communicates clearly with customers," "follows job process," etc.]

We currently track these metrics (if any):

[list any KPIs you already look at, or say "we don't track metrics yet."]

Please turn this into a one-page role scorecard that includes:

- key responsibilities
- key behaviors/standards
- 3-5 simple KPIs that are realistic for a company my size
- how often I should review these with the person in this role

Operations: capacity, hiring & performance

11. Performance & tough conversation

Help me say this clearly. ”

I need help planning a performance conversation.

Role: [e.g., tech, crew lead, CSR, etc.]

Here's the issue:

[brief description of the recurring behavior or problem]

Here's what I've already tried:

[any feedback or steps you've already taken]

Here's what I want to see change:

[clear description of desired behavior/result]

Using a calm, clear tone, please:

- 1) Draft a conversation script I can use that is firm but fair.
- 2) Reference our role scorecard and expectations where appropriate.
- 3) Include a few questions I can ask them to understand their perspective.
- 4) End with a clear next step and follow-up date.

Operations: capacity, hiring & performance

12. Weekly 1:1 / leadership cadence

Help me lead consistently. ””

I want to have a simple, consistent weekly 1:1 or team meeting.

The role/team is: [e.g., tech team, office team, specific role].

The key things I want to stay on top of are:

[list: quality, callbacks, schedule adherence, customer feedback, upsells, etc.]

These are the main KPIs I care about:

[list metrics, even if it's just a few]

Please create a 30-minute weekly meeting template that includes:

- a quick check-in
- review of key KPIs
- space to discuss issues or roadblocks
- space to recognize wins
- action items and owner

Write it as a simple agenda I can use every week.

Section 5

Growth: strategy, differentiation & referrals



13. Best next moves

What should we focus on first? 

I want help identifying the best next marketing moves for 2026.

Here's what we tried for marketing in the last 12 months:

[bullet list: Google ads, FB ads, postcards, email, SEO, home shows, etc.]

Here's what actually brought in revenue or good leads:

[bullet list]

Here's what didn't work or was unclear:

[bullet list]

Our slow season is: [months].

Our ideal customer is: [brief description].

Given all of this, please:

- 1) Identify the 3–5 highest-impact marketing or growth moves we should focus on for 2026.
- 2) Rank them by highest ROI and lowest complexity.
- 3) For the top 3, outline simple first steps I can take in the next 30 days.

Growth: strategy, differentiation & referrals

14. Stand out locally

How do we stop blending in? 🗨️

I want to stand out more in my local market.

In my city, the typical marketing for my type of business looks like:

[describe what you see competitors doing on social, ads, trucks, etc.]

The competitors I'm usually compared to are:

[list names or types]

Customers usually choose based on:

[price / reviews / speed / quality / convenience / etc.]

Here's what I believe actually makes us different or better:

[bullet list: craftsmanship, communication, niche expertise, warranties, story, etc.]

Using this, please:

- 1) Suggest 3–5 positioning ideas or messages that would make us stand out and are hard for competitors to copy.
- 2) Rewrite a simple website headline and subheadline using one of those angles.
- 3) Give me 3 example social posts or ad angles that reflect this unique positioning.

Growth: strategy, differentiation & referrals



15. Referral leverage

Who are my best partners
& how do I approach them?



I want to use referrals and relationships more intentionally.

We serve these ZIP codes/areas:

[list ZIPs or neighborhoods]

Our main services are:

[list services]

We already have some relationships with:

[realtors, property managers, HOAs, home inspectors, insurance agents, etc., if any]

Please:

- 1) List the top types of referral or relationship partners that would likely send us good business in these areas.
- 2) Suggest what value we can offer each type of partner (e.g., fast response, co-branded materials, maintenance tips for their clients, etc.).
- 3) Write 2–3 short outreach messages/emails I can send to start conversations with these partners in a friendly, low-pressure way.

Pulling it all together & staying consistent

16. Unified 2026 plan

Combine everything into one plan. ”

Use this once you've done some Money, Ops, and Growth prompts.

I want to pull everything we've worked on into one 2026 business plan.

Here are pieces of what we've created so far:
[paste in or reference summaries from the money, operations, and growth conversations]

Please combine this into a clear 2026 plan that includes:

- financial targets and key assumptions
- capacity and hiring notes
- top 3-5 growth and marketing priorities
- key systems or process improvements
- the main KPIs I should track
- suggested quarterly focus areas

Format it so I can share it with my team (sections, headings, and bullet points).

Pulling it all together & staying consistent

17. Weekly AI workflow

Help me use this every week. ”

I don't want this to be a one-time exercise. I want a simple weekly AI check-in.

My main priorities to keep an eye on in 2026 are:

[list: cash flow, booked jobs, slow season pipeline, team performance, etc.]

Each week I can provide:

[list what you can export or share: weekly numbers, job counts, notes, etc.]

Please:

- 1) Design a simple weekly AI check-in routine for me.
- 2) Tell me what to paste or upload each week.
- 3) Give me a short checklist of questions I should ask you each week to see if I'm on track.
- 4) Suggest how I can summarize that check-in for my team in 5-10 minutes.

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Everything to run and grow your business.



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THE **TRADES**

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