



AI CHECK-UP PLAN

Pennyfield Marquee Hire

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This is an example. Pennyfield Marquee Hire is made up. A real plan is written after a 2-hour session about your business, and it is yours to keep.

The short version

- Most lost time is in **enquiries and quotes**.
- The top 3 wins use **tools you already pay for**.
- Start with saved replies **this week**. No new spending needed.
- A person checks **everything** before it reaches a customer.

What you told me

WHAT EATS YOUR TIME

Answering enquiries (most ask the same 6 questions).
Writing quotes from phone notes. Making crew job sheets.

TOOLS YOU PAY FOR

Google Workspace (Gmail, Sheets, Docs). Xero for accounts. A website contact form. A free AI chat app on the owner's phone.

MUST NEVER GO WRONG

A wrong price or date sent to a customer. Customer details shared where they shouldn't be.

Your opportunities, best first

#	OPPORTUNITY	TIME SAVED*	EFFORT	COST
1	Draft replies to enquiries	~2 hrs a week	Low	Nothing extra, if your plan includes AI
2	Quotes from phone notes	~2 hrs a week	Medium	Nothing extra to do it yourself
3	Crew job sheets	~1 hr a week	Medium	Nothing extra
4	Social posts from job photos	~1 hr a week	Low	Nothing extra

*Estimates for the busy season, from the assumptions on pages 2 and 3. Not a promise.

The opportunities in detail

1 Draft replies to enquiries

TOOLS YOU HAVE

What it is	Saved replies for your 6 most common questions. Then the AI built into your email drafts a reply to each new enquiry. You check, edit and send.
Time saved	~2 hours a week. <i>Assumes</i> 25 enquiries a week, about 8 minutes each now and 3 with a checked draft.
Effort	Low. About half a day to write the saved replies.
Cost	Nothing extra if your Workspace plan includes AI features. If not, a small monthly fee per user. Saved replies alone are free.
Data and risk	Enquiries hold names, emails and event addresses. That is personal data under UK GDPR. Use your business account, not the free phone app. Prices and dates come from your price list and calendar, never from AI.

2 Quotes from phone notes

TOOLS YOU HAVE

What it is	A quote sheet where prices come from your price list by formula. AI turns your call notes ("60 guests, 6x12, chairs, lighting, June") into the item list. The sheet does the maths.
Time saved	~2 hours a week. <i>Assumes</i> 10 quotes a week, about 25 minutes each now and 12 with the sheet.
Effort	Medium. About a day to set up the price list and sheet.
Cost	Nothing extra if you build it yourself. Or I build it for you as an AI Set-up (from £750).
Data and risk	AI never sets prices: totals come from the sheet. Keep customer names out of the AI step and add them in the sheet. A person checks every quote before it goes.

3 Crew job sheets

TOOLS YOU HAVE

What it is	From a confirmed booking, AI drafts a one-page job sheet: kit list, timings, access notes, site contact.
Time saved	~1 hour a week. <i>Assumes</i> 4 events a week, about 20 minutes each now and 5 with a draft.
Effort	Medium. A few hours to set up the job sheet layout.
Cost	Nothing extra.
Data and risk	Crew only need the site address, one contact number and access notes. Leave everything else off. Archive sheets after the event.



4 Social posts from job photos

[START TODAY](#)

What it is	AI drafts a short caption from your notes about each event. You edit and post.
Time saved	~1 hour a week. <i>Assumes</i> 3 posts a week, about 25 minutes each now and 5 with a draft.
Effort and cost	Low effort. Nothing extra to pay.
Data and risk	Ask customers before posting photos of their event or home. Don't name them or the venue without a yes.

Quick wins **this week**

01

Write 6 saved replies

Starting prices, sizes, what's included, availability, deposits, bad weather.

About 1 hour

02

Check your AI settings

Stop using the free phone app for customer work. In your business account, check who can see the data and if it is used for training.

About 15 minutes

03

Keep a tally for a week

Count enquiries, quotes and job sheets, and roughly how long each takes. Then you can measure the difference.

A minute a day

What not to do (yet)

- ✗ **No website chatbot yet.** A wrong answer about price or dates costs more than it saves. Look again once saved replies work.
- ✗ **Don't let AI send anything** to a customer on its own.
- ✗ **Don't let AI confirm** prices or availability.
- ✗ **Don't paste** your bookings sheet or customer list into a free AI app.
- ✗ **Don't buy an "all-in-one AI" subscription.** The tools you have cover all 4 wins.

Keeping customer data safe

- 1** No customer names, emails, phone numbers, addresses or payment details in AI tools, unless it's your business account and you've checked its settings.
- 2** A person reads every AI draft before it reaches a customer.
- 3** Keep a short list of the AI tools the business uses, and who uses them.
- 4** Staff use the business account for customer work, not personal AI apps.

Next step

- **Do it yourself.** Wins 1, 3 and 4 need no outside help. This plan has what you need to start.
- **Or an AI Set-up, from £750.** I build win 2 (quotes) into how you work, test it on real enquiries, and hand it over with notes. Fixed price agreed first.
- **In 4 weeks,** compare your tally with week one. Keep what saves time. Drop what doesn't.