

FOR THE TRADES

AI for the Trades

The real quote, the real message bank, the real prompt library — not a lecture about them. Where AI genuinely claws back your evening admin, and the bright lines it must never cross on the tools.

For the tools-in-hand trade

● Shipped — measured, gate-clean

COVER: A WELL-WORN FOLDING CARPENTER'S RULE, THE TICK MARKS RUBBED SOFT BY YEARS IN A TOOL BAG — REAL PHOTOGRAPH, THOR (WIKIMEDIA COMMONS, CC BY 2.0).

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01 The honest size of it

What AI is for a one-van firm — and, just as plainly, what it is not.

02 Where it genuinely helps

Six jobs a one-van firm can hand to AI this week — with the prompt for each.

03 Worked example: a scribbled job becomes a proper quote

A bathroom rip-out and refit, from the back of a van to a client's inbox — including the day AI got the total wrong.

04 The message bank — ten you can copy tonight

The messages every self-employed tradesperson means to send and rarely does. Paste, personalise, send.

05 The prompt library — twelve for the trade

A real bank of prompts, each with the one line that keeps you safe: your check.

06 Scheduling a week of jobs

A jumbled list becomes a sensible route — and your week gets a shape.

07 Turning site notes into paperwork: the job sheet and the RAMS starter

A photo and a scribbled note become a proper job sheet — and a method statement gets its shell, never its judgement.

08 Marketing you never get to

A Google Business listing, five ready posts, and how to reply to a review that stings.

09 What NOT to trust it with — the STOP story

A customer pushes for a cable-size answer. Here's exactly why the answer is always no.

10 Tax, records and Making Tax Digital

AI drafts and explains; your submitted figures are your legal responsibility, full stop.

11 Customer data — what not to type

Anything you paste in goes to the tool's company. Treat it that way.

12 A safe first task, tonight

Ten jobs to hand to AI this week — none of them can put you at risk.

13 TEMPLATE: your quote skeleton and terms

The structure behind the worked example — fill in your own figures, every time.

14 Image credits & attributions

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15 Sources, glossary & the honesty ledger

Every claim carries its tier · nothing faked

PREPARED

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VERIFIED BY

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15 years building safety-critical AI

HOW TO READ IT

Drafted with AI, verified by a
named human. Sources at the back.

01 The honest size of it



What AI is for a one-van firm — and, just as plainly, what it is not.

You didn't get into the trade to sit doing quotes at ten at night. This guide is about using AI to claw back that evening admin — the quotes, the chasing, the scheduling, the marketing you never get round to — without letting it anywhere near the parts of the job where being wrong gets someone hurt. Plain English, real templates you can lift tonight, and the hard limits stated straight, because a guide for the trades that hedges on safety is worse than useless.

THE PLAIN TRUTH

First, before anything else

AI won't do the work on site and it won't sign off a job. What it will do is take the office grind off your hands — drafting quotes and messages, tidying your scheduling, writing the marketing you never write. Think of it as a cheap office assistant who works evenings, not a second tradesman. Everything in this guide sits inside that limit.

In practice it's an assistant you talk to in plain language on your phone — you type or dictate, it writes back. Tools like ChatGPT, Claude or Gemini can draft, summarise, explain and organise text. If you're new to it, start with our *Beginner's Guide to ChatGPT*; everything below builds on that. Nothing here needs new kit, a subscription you can't cancel, or a bolt-on to your quoting software — a phone and ten minutes is the whole barrier to entry.

The whole guide, at a glance

Our AI Reliability Traffic Light, applied to the jobs a one-van firm actually has. Green means go; amber means useful but check it; red means keep it well away.

Drafting quotes, messages, posts, job sheets and RAMS starters A real time-saver on evening admin — you supply and check every fact.	 Go as of July 2026
Chasing invoices, replying to reviews, confirming appointments The messages you keep meaning to send — drafted in seconds, sent by you.	 Go as of July 2026
Working out cable/pipe sizing, structural loads or gas calculations Do not trust its numbers or technical judgement — that's your calc, to BS 7671 or the relevant standard, every time.	 Stop as of July 2026
Anything notifiable, certifiable, or requiring a registered competent person Building regs sign-off, electrical work under the regs, gas work — a qualified, registered human, never a chatbot.	 Stop as of July 2026

			
Quotes scribble in, breakdown out	Schedules a jumbled list, sorted	Messages chasers, confirmations, replies	Job sheets & RAMS notes tidied, never invented

Where AI earns its place in a one-van firm — and only there.

I don't want a lecture, mate — I want the templates. Give me the actual words, ready to copy.

Dave, self-employed electrician, Bristol

02 Where it genuinely helps



Six jobs a one-van firm can hand to AI this week — with the prompt for each.

Q **quotes and estimates — the writing, not the pricing.** Give it the job, your labour rate and your materials list, and it drafts a clear, professional quote with a proper breakdown and terms. You supply the numbers and check them; it

just turns your notes into something you'd be proud to send.

Chasing and admin. Polite payment reminders, follow-ups on quotes, appointment confirmations, a firm-but-fair letter about a late payer. The messages you keep meaning to send.

Scheduling, in plain words. "I've got these six jobs this week, two need materials ordered first, one's the other side of town — sort me a sensible order." It's a good planner; you make the final call.

Marketing you never get to. A Google or Facebook post, a before-and-after caption, a tidy website description, a review reply — warm, professional, quick.

Job notes and paperwork. Dictate a rough site note and have it turned into a clean job sheet or a RAMS starter — the shell, never the hazard judgement.

Making sense of the boring stuff. Paste in a supplier's terms, an insurance letter, or a chunk of a spec and ask, "What does this actually mean for me?"



Real trade fabric: hand tools, kept sharp and put away clean — the discipline this guide asks of your paperwork too.

Source: Photo: Carpenter workshop tools, Vienna — Wikimedia Commons, CC BY-SA 3.0

What the assistant does

- Drafts quotes, messages and posts from your notes
- Tidies a scribbled site note into a job sheet
- Sorts a jumbled job list into a sensible route
- Drafts the shell of a RAMS or method statement

VS

What stays yours

- Every price, margin and final total
- Every cable, pipe, load and gas calculation
- Every hazard judgement and sign-off
- Anything notifiable, certifiable or registered

The whole method in one picture: the assistant does the writing-up; you keep everything that carries weight.

You don't need new software

None of this bolts onto your quoting package or your accounting app. It's a chat window on your phone. You paste your own notes in, you paste the answer into your existing quote template or invoice tool, and you send it from there — same software you already use, just less time staring at a blank line.

03 Worked example: a scribbled job becomes a proper quote

A bathroom rip-out and refit, from the back of a van to a client's inbox — including the day AI got the total wrong.

This is the job every reviewer of this guide asked for by name: not "AI can draft a quote" but the actual quote. Here it is, start to finish, with the real arithmetic — and the one place it went wrong, left in on purpose.



The four steps of a safe first use — the check is never skipped.



The job this quote is for: real work, on site, with a toolbox and a generator, not a spreadsheet.

Source: Photo: Electrician Working — Wikimedia Commons, CC BY 2.0

WORKED
EXAMPLE**Bathroom rip-out and refit — the scribbled note → the finished quote**

Rip out and refit, two days, you plus a labourer, materials around £620.

YOUR NOTES, ON THE
TAILGATE

bathroom, rip out + refit, 2 days, me + labourer, materials
~£620, day rate £280

YOU ASK

Turn this into a full itemised quote: my labour, my labourer's day rate of £150, materials with a sensible 8% markup for sundries and fixings, £90 skip hire, a clear total, and standard payment terms. British English, ready to send.

AI DRAFT

Job: Bathroom strip-out and refit — labour and materials, 2 days.

Your labour — 2 days @ £280/day £560.00

Labourer — 2 days @ £150/day £300.00

Materials (fixings & sundries incl.) ... £669.60

Skip hire £90.00

Total **£1,660.00**

Payment terms: 25% deposit on acceptance, balance on completion. Quote valid 30 days. No VAT charged — not VAT-registered.

YOUR CHECK  YOU

You re-add the column by hand: £560 + £300 + £669.60 + £90 = **£1,619.60**, not £1,660. The assistant's total was **£40.40 out** — every line item was right, the addition wasn't. You correct the total, round the materials line to £670 for a clean quote, and the real total goes out at **£1,620**.

A proper, itemised quote in two minutes instead of twenty — and a genuine reminder of the rule underneath this whole guide: **AI drafts the paperwork; you own every number**. If a language model can get a three-line addition wrong with total confidence, it can get a cable size or a gas calculation wrong with the same confidence. Check everything, every time.

~20 min

writing the quote by hand, sofa, 10pm



you still check every figure

~2 min

draft, re-add the column, send

The time it actually saves on the write-up — with the responsibility unchanged.

The 10pm scrawl

- "bathroom job, couple of days, say £1600ish"
- No breakdown — client can't see what they're paying for
- No terms — deposit and payment left unsaid
- Sent from the sofa, half-checked

VS

The AI-drafted quote, checked

- Labour, labourer and materials broken out separately
- Skip hire and markup shown, not buried
- Deposit, balance and validity stated plainly
- Total re-added by hand before it was sent

The same job, two ways — what changed is the breakdown, not the honesty of the number.

One more thing this quote doesn't do for you: set your day rate in the first place. That figure — £280 in this example — has to cover more than the day itself, and it's the one number in this whole guide an assistant can lay out for you but can never set for you.

$$\text{Day rate} = \frac{\text{Target take-home} + \text{overheads} + \text{tax \& NI put-aside}}{\text{billable days per year}}$$

A worked example: target take-home £38,000, overheads (van, fuel, tools, insurance, training) £9,000, tax and National Insurance put aside at roughly 25% of the total (£9,500) — £56,500 all in. Divide by 180 billable days (out of roughly 230 working days, once quoting, admin, travel and holiday are taken out), and the day rate that actually covers your year is **£314**.

AI can lay this sum out in seconds and even sanity-check your arithmetic. It cannot tell you your real overheads, your real billable-day count, or what the market in your area will bear — that judgement, like the total on every quote, stays yours.

The day-rate maths behind the number on every quote you send

04 The message bank — ten you can copy tonight

The messages every self-employed tradesperson means to send and rarely does. Paste, personalise, send.

These are not descriptions of messages — they are the messages. Swap in the name, the job and the figure, and every one of these is ready to send from your phone tonight.

TEMPLATE — the message bank

Ten copy-paste messages. Fill the brackets, check the facts, send.

- ☐ "Hi [name], just following up on the quote I sent for [job] on [date] — happy to answer any questions, or talk through the timing if that helps. No pressure either way!"

Quote follow-up — send 3-4 days after quoting, before it goes cold.

- ☐ "Hi [name], hope you're well — just a friendly note that invoice #[number] for [job] was due on [date]. Let me know if you'd like to arrange payment, or shout if there's a query with it."

Payment chaser, 14 days overdue — warm, no accusation.

- ☐ "Hi [name], following up again on invoice #[number], now [X] days overdue. Could you confirm when payment will be made this week? Happy to discuss if there's an issue."

Payment chaser, 30 days overdue — firmer, still professional.

- ☐ "Hi [name], invoice #[number] remains unpaid at [X] days overdue despite two reminders. Please arrange payment by [date] to avoid this being passed to a debt-recovery service / small claims."

Final notice, 45+ days — say only what you're actually prepared to do next.

- ☐ "Hi [name], running about [X] mins behind on the last job — with you by [time], sorry for the wait!"

Running late — send it before they have to ask.

- ☐ "Hi [name], to lock in [date] I'll need a £[amount] deposit — I'll send a link/details now and get the materials ordered as soon as it clears."

Deposit request — ties the date to the payment, politely.

- ☐ "Hi [name], confirming [job] for [date] at [time] — I'll need access to [location]. Any pets/parking notes, let me know. See you then!"

Appointment confirmation — cuts no-shows and wasted call-outs.

- ☐ "Thank you so much for the kind words, [name] — really glad the [job] worked out well for you. Appreciate you taking the time to leave a review!"

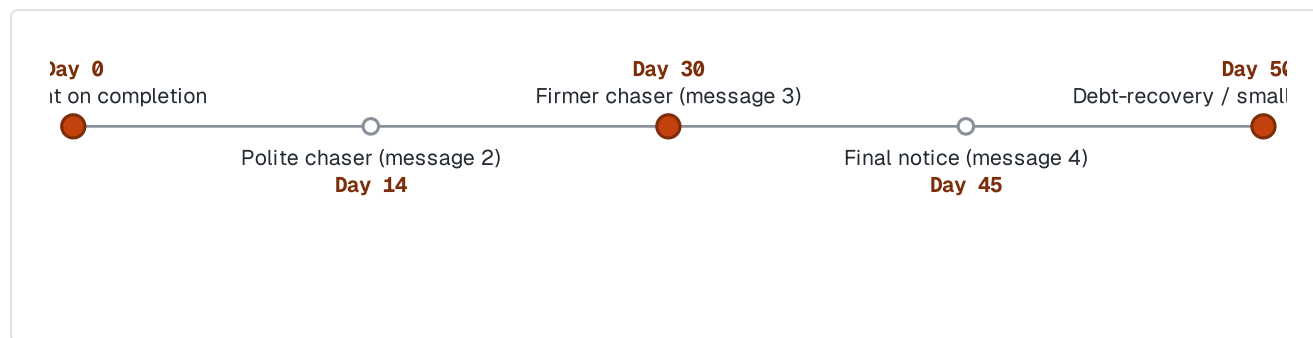
5-star review reply — warm, specific, no cut-and-paste feel.

- ☐ "Thanks for the feedback, [name] — sorry the [issue] wasn't what you expected. I'd like to put it right; please give me a call on [number] so we can sort it."

3-star (or lower) review reply — never defensive, always an open door.

- ☐ "Hi [name], your annual [EICR / gas safety check] is due around [month] — want me to get you booked in before then?"

Annual safety-check reminder — genuinely useful, and it fills your quiet weeks.



The late-payment chase sequence — the same messages above, laid out on the calendar. Escalate on a schedule, not on a bad mood.

Escalate on a schedule

The single biggest improvement most self-employed tradespeople could make to their cash flow isn't chasing harder — it's chasing on a fixed schedule instead of when they finally get annoyed enough. Diary the four dates the moment an invoice goes out, and let AI draft each message on the day. You still decide whether to actually escalate to debt recovery or small claims — that's a real decision with real cost, never automate it away.

05 The prompt library — twelve for the trade

A real bank of prompts, each with the one line that keeps you safe: your check.

A good trade prompt has the same four parts every time: the job, your numbers, the format you want it in, and the check you'll do before it goes anywhere near a customer. Miss the last part and you're trusting the tool; keep it and you're just using a fast typist.

THE JOB

Bathroom rip-out and refit, 2 days, me + labourer
Be as specific as your scribbled note already is

YOUR NUMBERS

£280 day rate, £150 labourer, £620 materials
Every figure comes from you — never let AI supply one

FORMAT

Itemised quote, British English, standard terms
Tell it the shape you want, once, and reuse the prompt

YOUR CHECK

Re-add every column by hand before it's sent
The part that stays yours, always

The anatomy of a prompt that keeps you in charge.

#	PROMPT	YOUR CHECK
1	"Turn these job notes into a full itemised quote with a breakdown and standard terms: [notes]."	Re-add every total by hand.
2	"Tidy this scribbled site note into a clean job sheet with sections for work carried out, materials used and any issues found: [note]."	Confirm every material, part number and issue against your own memory of the job.
3	"Draft the shell of a RAMS for [task] with sections for hazards, control measures, PPE and emergency procedure — leave the specific hazards and controls for me to complete."	A competent person fills in and signs every hazard — never the AI.
4	"Summarise this 40-page manufacturer manual / spec sheet and flag anything about warranty, safety or installation requirements: [pasted text]."	Check any figure or requirement you'll rely on against the actual manual.
5	"Draft a polite payment chaser for an invoice [X] days overdue, warm but clear about the amount and date."	Confirm the invoice number, amount and days overdue are correct.
6	"Draft a warm, specific reply to this Google review: [review text]."	Read it back as if you were the customer — never sound scripted.
7	"Draft a polite decline for a job I can't take on: [reason], and suggest they try [type of tradesperson] instead."	Make sure the reason given is the real one — don't let it invent an excuse.
8	"Write 3 short social media posts advertising this finished job, with a call to action: [job description]."	Check nothing in the post reveals a customer's address or personal details.
9	"A customer described their job like this: [their message]. What 3 clarifying questions should I ask before I quote?"	Use the questions as a prompt for your own judgement, not a script.
10	"Explain this insurance / warranty letter in plain English and list anything I need to do and by when: [pasted letter]."	Verify every date and requirement against the original letter — don't act on the summary alone.
11	"Here's my jumbled job list for the week with locations and time needs — suggest a sensible day-by-day order: [list]."	You make the final call on the order — travel and gut feel beat a spreadsheet.
12	"Draft a professional email asking for a deposit before I order materials and start [job] on [date]."	Confirm the deposit amount and date match what you actually agreed.

Twelve prompts for the trade — copy the wording, swap the brackets.

Every prompt ends the same way, whether it's written out or not: you check the facts before they leave your phone.

06 Scheduling a week of jobs



A jumbled list becomes a sensible route — and your week gets a shape.

Most weeks start as a list, not a plan: jobs booked as calls came in, with no thought to who's near who or what's actually urgent. AI is a genuinely good first pass at untangling that — not because it knows your roads better than you do, but because it's fast at holding six constraints in its head at once so you don't have to.

JOB	AREA	NOTE
Kitchen sockets fault	Bishopston	Called this morning, wants it today
Consumer unit upgrade	Filton	Parts already ordered — all-day job
EICR test	Staple Hill	Tenant needs access by 9am sharp
Light fitting, quick job	Horfield	About 30 minutes
Quote visit, new customer	Fishponds	Flexible on time
Pick up parts	Yate wholesaler	Needed for Wednesday's job

Monday's jumbled job list, as it came in.

WORKED EXAMPLE

The jumbled list → a routed day

YOU PASTE THE LIST AND ASK

"Here's my job list for Monday with areas and notes — suggest a sensible order, bearing in mind the EICR needs a 9am start and the quote is flexible."

AI DRAFT

09:00 Staple Hill — EICR (tenant needs 9am). 09:45 Horfield — light fitting on the way back (quick, 30 min). 10:30 Bishopston — kitchen sockets fault (urgent, fits before lunch). 13:00 Yate — collect parts for Wednesday. 14:00 Fishponds — quote visit (flexible, end of day works). Filton's consumer unit is a full day on its own — suggest Tuesday.

YOUR CHECK YOU

You know the Bishopston–Horfield road works AI doesn't, so you swap those two — but the shape of the day, the 9am priority and pushing Filton to its own day are all exactly right. You made the final call; it did the untangling.

A jumbled list becomes a day you can actually drive, in about a minute of typing — leaving the judgement about roads, traffic and which customer will actually be ready exactly where it belongs: with you.

The same habit works across a whole week, not just a day — and this is where AI earns a regular slot in your routine rather than a one-off trick.

WHEN	ON THE TOOLS	OFF THE TOOLS, WITH AI
Sunday evening	—	Route Monday–Tuesday from the week's job list (15 min)
Monday–Tuesday	Filton consumer unit upgrade	Draft Wednesday's quote from Saturday's site visit notes
Wednesday	Smaller jobs, parts run	Send the 14-day payment chasers that fell due
Thursday	EICRs, call-outs	Tidy Tuesday's site note into a job sheet; draft a RAMS starter for Friday's job
Friday	Bigger job / finish week	Reply to the week's reviews; one social post from a finished job photo
Saturday morning	Quote visits	—

Your week on the tools, with AI — a realistic shape for a one-van firm.

07 Turning site notes into paperwork: the job sheet and the RAMS starter

A photo and a scribbled note become a proper job sheet — and a method statement gets its shell, never its judgement.

Two kinds of paperwork eat a tradesperson's evening for no good reason: the job sheet that should have been written on site, and the risk assessment / method statement (RAMS) that a bigger job or a fussier client now asks for. AI is genuinely good at the first — tidying what you already know into a form a customer or a main contractor will accept. It is only ever a drafting aid for the second, because a RAMS is a safety document, and the hazards and controls in it have to come from a competent person who actually knows the job, not a language model guessing at what a bathroom rewire usually involves.



The paperwork this chapter is about starts here — on site, in whatever notes and photos you actually take.

Source: Photo: A construction worker plastering a house — Chabie10, Wikimedia Commons, CC0

WORKED EXAMPLE

A photo and a scribbled note → a job sheet

End-of-day, phone in hand, before you forget what actually happened.

YOUR NOTE

filton job, replaced 6 way board with 10 way, added 2 new circuits kitchen sockets, found some old cable in loft not up to standard flagged to customer, tested and certified, customer wants quote for loft cable next

YOU ASK

Turn this into a clean job sheet with sections for: customer, address, date, work carried out, materials used, issues found, recommendations, and signed off by.

AI DRAFT

Work carried out: Replaced 6-way consumer unit with new 10-way unit; added two new circuits for kitchen sockets. **Materials used:** 10-way consumer unit, MCBs/RCBOs as required, cable and accessories for two new circuits. **Issues found:** Existing cabling in the loft identified as not meeting current standard — flagged to customer, not part of today's works. **Recommendations:** Customer to be quoted separately for loft cable replacement. **Testing:** Installation tested and certified.

YOUR CHECK YOU

You confirm the circuit count, the board rating and every material against your own paperwork and the certificate you actually issued — a job sheet that mis-states what was tested is worse than no job sheet at all. Once it matches, you sign it.

Two minutes at the kitchen table instead of a task that quietly never gets done — and a genuinely useful record for you, the customer, and the loft-cable quote that's now a five-minute follow-up instead of a cold start.

TEMPLATE — a RAMS starter (risk assessment / method statement)

Ask AI to draft this shell from your job description — then a competent person fills in and signs every hazard and control. Never the reverse.

- ☐ Job description, location, date and the person(s) carrying it out.

- ☐ Sequence of work, step by step, in the order it will actually happen.

- ☐ Hazards specific to THIS job — not a generic list.
Electrical isolation, working at height, manual handling, asbestos risk in older properties, confined spaces — whatever genuinely applies.

- ☐ Control measures for each hazard, named and specific.
"Isolate and lock off at the consumer unit, prove dead before work starts" — not "work safely."

- ☐ PPE required for the job, listed by item.

- ☐ Emergency procedure — nearest exit, first aider, what to do if it goes wrong.

- ☐ Signed and dated by the competent person responsible — never left blank, never "AI-generated."
This line is the one an inspector, client or insurer will actually look at.

KEEP A HUMAN HERE

A RAMS is a safety document, not a formatting exercise

AI has never stood in your loft, never seen your access, and doesn't know whether the floor joists near that hatch are sound. It can draft the shape of a method statement in seconds — the sections, the structure, the professional wording. It cannot identify the hazards on your actual job, and it must never be allowed to invent a control measure that sounds plausible but wasn't actually assessed. Draft the shell with AI; do the risk assessment with your own eyes, on site.

08 Marketing you never get to



A Google Business listing, five ready posts, and how to reply to a review that stings.

Most self-employed tradespeople get almost all their work from word of mouth and a Google search — and then never touch the one free listing that controls how they show up in both. A Google Business Profile with a filled-in description, real photos of finished work, and replies to every review (good and bad) is worth more than most paid advertising a one-van firm could afford, and AI can draft the entire thing in an evening.

Your Google Business Profile — the AI-drafted version

Draft each of these with AI, then check it reads like you before it goes live.

- ☐ Ask: "Write a 200-word Google Business description for a [trade] covering [your area], honest and specific, no hype." Then cut anything that isn't true.
- ☐ Upload real photos of finished jobs — a phone snap beats a stock image every time.
- ☐ Set your service area and opening hours accurately — a wrong hour costs you a missed call.
- ☐ Reply to every review within a few days, using the message bank in this guide as your starting point.

USE IT FOR	THE POST
A finished job	"Another [job type] wrapped up in [area] this week — full rewire, tested and certified. Message me for a free quote on your next job."
A before/after	"Before and after: [brief description]. Same-day quote, tidy finish, no mess left behind. DM for availability."
A seasonal reminder	"[Season] is when [common issue] starts showing up — if your [system] hasn't been checked this year, now's a good time. Booking [month] slots now."
A trust-builder	"[Number] years trading in [area], fully [qualification/registration]. Happy to send references from recent jobs — just ask."
A call for work	"Got a couple of slots free the week of [date] — [trade] work in [area]. Drop me a message if you've got a job that needs doing."

Five ready social posts — swap the brackets, add your own photo.

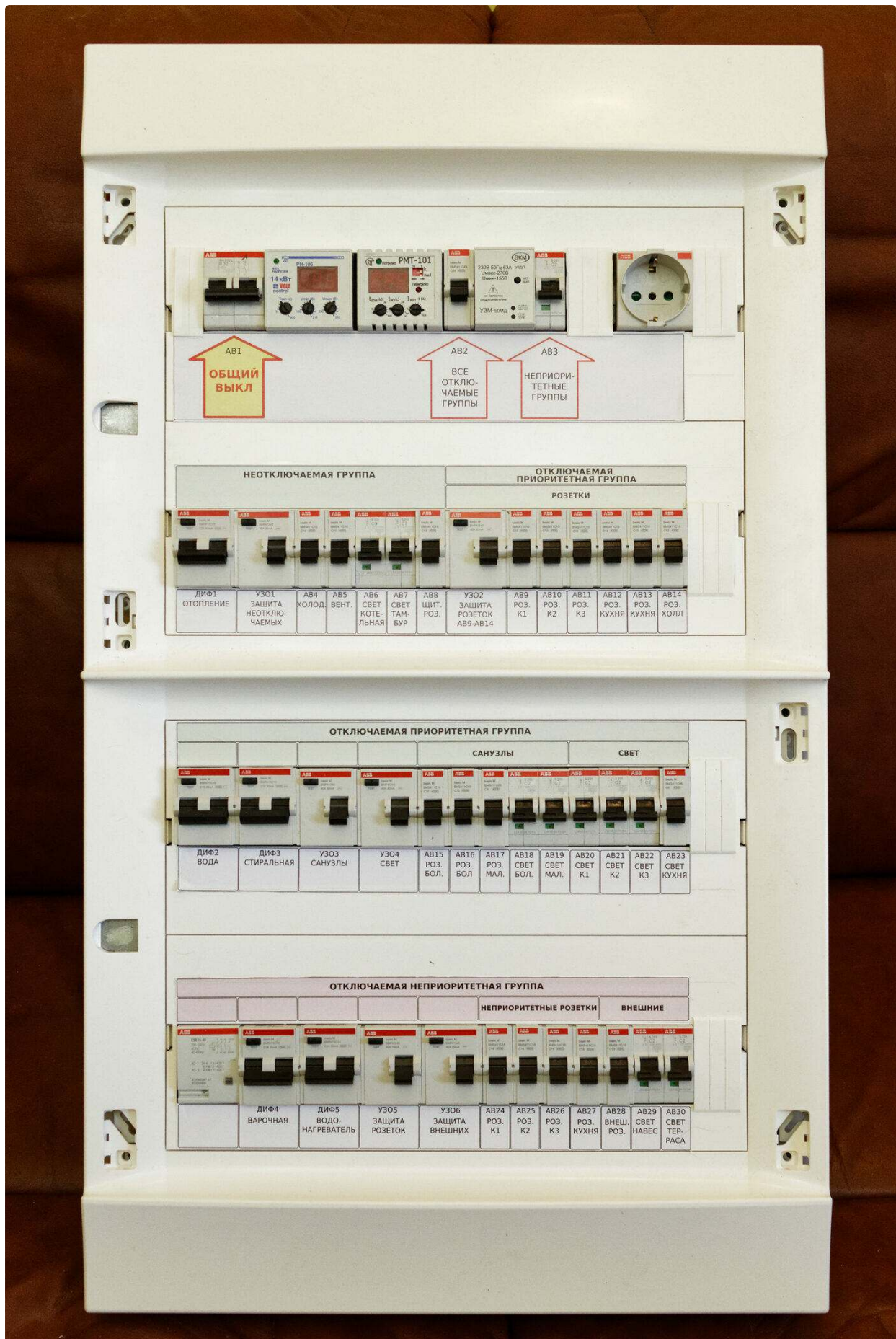
A bad review will happen eventually, however good your work is. The temptation is to argue the facts in public; the better move is the one in the message bank — acknowledge, apologise for the experience even if

you disagree with the detail, and take it to a phone call. Anyone reading it later judges you on the reply, not the review.

09 What NOT to trust it with — the STOP story

A customer pushes for a cable-size answer. Here's exactly why the answer is always no.

Every reviewer of the thin version of this guide said the same thing: the safety rule was stated, correctly, and never shown. Here it is shown — a real question, a plausible AI answer, and exactly why that answer must never leave the phone.



The consumer unit is where the rule in this chapter actually bites — every circuit on that board was sized to a calculation, not a guess.

Source: Photo: Small house distribution panel – Retired electrician, Wikimedia Commons, CC0

WORKED EXAMPLE

The question that must never be answered by a chatbot

THE CUSTOMER ASKS

"You've got AI now, right? Can't you just ask it if the cable's big enough for my new shower, save you doing the sums?"

WHAT A CHATBOT WILL CONFIDENTLY SAY IF YOU LET IT

"For a 9.5kW shower on a typical domestic circuit, 6mm² twin-and-earth cable run in the usual way should be adequate, subject to installation method and cable length."

WHY THAT ANSWER IS DANGEROUS, NOT JUST IMPRECISE

It sounds right, and it might even be right for a common case — but it is missing every variable that actually decides the answer: the run's real length, the installation method (clipped direct, in insulation, in a stud wall), grouping with other cables, ambient temperature, and the voltage-drop calculation over that specific run. A chatbot has none of that, will never ask for all of it, and will still answer with total confidence. Get this wrong and the failure mode isn't a bad review — it's an overheating cable behind a wall.

YOU

THE ANSWER YOU ACTUALLY GIVE THE CUSTOMER

"I calculate that to BS 7671, with the real numbers from your installation — the cable run, how it's installed, what else is on that circuit. That's the job you're paying me for. I don't ask a chatbot, and you shouldn't want me to."

YOU

Say that once, calmly, and most customers respect it more than they would a quick "yeah that'll do" — because it's exactly the answer they'd want from you if it were their house.

The rule for the whole van

AI drafts the paperwork; you own every number and every sign-off. Cable and pipe sizing, structural loads, boiler and flue specs, gas calculations, whether a wall is load-bearing, whether an old system is fit to reconnect — eyes, experience, the right test kit and the real standard, never a phone. If getting it wrong means an undersized cable, a failed inspection, or a dangerous job, that stays with the qualified human, always.

The safe-vs-verify-first line, trade by trade

Where the line sits across the jobs a one-van firm actually does.

Drafting a quote, message, post or job-sheet wording from your own figures Real time saved on the writing; you supplied and check every fact.	 Go as of July 2026
Sorting a jumbled job list into a sensible day order A fast first pass at planning; you know the roads and the customer.	 Go as of July 2026
Explaining a supplier's terms, a manual, or an insurance letter Good for a first read — verify anything you'll rely on against the original.	 Amber as of July 2026
Drafting the shell of a RAMS or method statement The structure only — a competent person supplies and checks every hazard and control.	 Amber as of July 2026
Cable, pipe, gas or structural sizing and calculations Confident and wrong look identical. Calculate to the real standard, every time.	 Stop as of July 2026
Anything notifiable, certifiable, or requiring a registered competent person Legal responsibility sits with a registered human, never a tool.	 Stop as of July 2026

Gas work must be done by a Gas Safe registered engineer — legal competence and registration sit with a qualified person, never with an AI tool. Certain building work needs building-regulations approval and sign-off; that responsibility is a human, competent-person duty that AI can explain but never discharge.

Does it touch a cable/pipe size, a load, a gas or electrical calculation, or a sign-off?	Yes → STOP — calculate it yourself, to the real standard	No → Continue
Does it involve a customer's personal or payment data?	Yes → Redact names and figures first, or don't paste it in at all	No → Continue
Is it drafting words from facts you already know and will check?	Yes → Safe to draft with AI — you verify before it's sent	No → Treat it as unverified until you've confirmed it against the source

Three questions that tell you whether a task is safe to hand to AI at all.

10 Tax, records and Making Tax Digital



AI drafts and explains; your submitted figures are your legal responsibility, full stop.

If you're VAT-registered — or getting close to the threshold — your digital record-keeping and returns have to meet HMRC's Making Tax Digital rules. AI is genuinely useful here for drafting client-facing explanations, tidying expense notes into categories, or explaining what a rule actually means for a business your size. It is not a substitute for your bookkeeping software, your accountant, or your own checking of every figure before it's submitted.

MTD for Income Tax is arriving for the self-employed too

Making Tax Digital is expanding beyond VAT to income tax self assessment for self-employed people and landlords above set income thresholds, on a phased timetable — confirm your own start date and the current thresholds on [gov.uk](https://www.gov.uk), because they are subject to change. AI can help you understand what quarterly digital updates will mean for your record-keeping; it cannot file them for you, and it must never be trusted with your actual submitted figures.

A safe, genuinely useful habit: dictate your week's expenses and receipts into a note, ask AI to sort them into sensible categories (materials, tools, fuel, subsistence, insurance), and paste the tidy version into your bookkeeping software yourself. You've saved the sorting time; you still own every figure that reaches HMRC.

11 Customer data — what not to type



Anything you paste in goes to the tool's company. Treat it that way.

Don't paste in a customer's full address, card or bank details, alarm codes, medical or vulnerability notes, or anything else you wouldn't hand to a stranger in the street. If you hold customer information — which every trading business does — you have data-protection duties, and that includes knowing what a tool does with what you type into it.

MAY GO IN	MUST NEVER GO IN
A job description, area, and your own labour/material figures	A customer's full name plus address plus access details together
A supplier's published terms or a manufacturer's manual text	Card numbers, bank details, or alarm/lock codes
A rough site note with materials and work done, no personal details	Anything about a vulnerable customer's circumstances
A draft social post about a finished job, address redacted	A photo showing a customer's door number, car plate or post visible on a table

What may go into a general AI tool, and what must never go in.

A useful habit either way: replace a real name with "Customer A" before you paste anything in. The assistant rarely needs the real name to do the drafting job you're asking of it.

12 A safe first task, tonight



Ten jobs to hand to AI this week — none of them can put you at risk.

Take the last quote you scribbled on a notepad. Type the bare facts into the assistant — the job, your day rate, the materials and rough prices — and ask it to turn this into a clear, professional quote with a breakdown and simple terms, in British English. Then check every number and send it. You'll have a smart-looking quote in two minutes, you'll see exactly how it works, and because you checked the figures, there's no risk.

TEMPLATE — 10 jobs to hand to AI this week

Pin this to the dashboard. Tick one off most evenings; none of them can go wrong.

- ☐ Turn your last scribbled quote into a proper, itemised one.
- ☐ Draft this week's payment chasers for anything overdue.
- ☐ Write three social posts from photos of a recent job.
- ☐ Reply to your last two Google or Facebook reviews.
- ☐ Draft a RAMS starter for your next bigger job.
Then fill in and sign every hazard yourself.
- ☐ Turn yesterday's site note into a clean job sheet.
- ☐ Draft your week's schedule from your jumbled job list.
- ☐ Write the deposit-request message for your next new customer.
- ☐ Get a plain-English explanation of a supplier's terms you've never actually read.
- ☐ Write or tidy your Google Business Profile description.

Do that for a week on your quotes and reminders and you'll quickly feel where it saves you real time. For the trades, AI is the office assistant you couldn't afford — clearing the quotes, the chasing, the scheduling and the marketing so your evenings are yours again. It is not a calculator you can trust, not a substitute for the regs, and never the competent person who signs off a job. Keep it firmly in the office, own every number and every certificate yourself, and it'll pay for the time it saves you many times over.

13 TEMPLATE: your quote skeleton and terms

The structure behind the worked example — fill in your own figures, every time.

This is the skeleton the worked quote in this guide was built from. Keep this prompt on your phone and every quote you send will have the same professional shape, however rough the note it started from.

SECTION	WHAT GOES IN IT
Job description	What the work is, in one clear line the customer would recognise
Labour	Your day/hour rate × time, and any additional labour named separately
Materials	Listed with your markup shown or folded in — your choice, but be consistent
Extras	Skip hire, parking, access equipment — anything real that isn't labour or materials
Total	Re-added by hand before it's sent — every time, no exceptions
VAT	Shown and correct if registered; stated as "not VAT-registered" if not
Payment terms	Deposit %, balance timing, and what happens if payment is late
Validity	How long the quote stands before prices need reconfirming

TEMPLATE — the quote skeleton.

The prompt that builds it every time

Save this once; reuse it for every quote you send.

- ☐ "Turn these job notes into a full itemised quote: [job, your day rate, labourer rate if any, materials estimate, any extras]. Include a clear total, standard payment terms (25% deposit, balance on completion), 30-day validity, and note VAT status as [registered/not registered]. British English."
- ☐ Re-add every column by hand before it leaves your phone.
- ☐ Confirm the VAT line matches your actual registration status.

14 Image credits & attributions



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A plumber's pipe wrench — the sort of tool this guide's message bank and prompt library are meant to sit alongside in the van, not replace.

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15 Sources, glossary & the ledger

Where every claim comes from — and what the plain words mean.

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Plain-English glossary

AI assistant	A tool you talk to in plain language (ChatGPT, Claude, Gemini) that drafts, summarises and explains text. It is not connected to your quoting software, your bank, or the regs.
RAMS	Risk Assessment and Method Statement — a document setting out the hazards, controls and sequence of work for a job. AI may draft the shell; a competent person supplies and signs every hazard.
Part P	The part of the Building Regulations covering electrical safety in dwellings. Certain electrical work is notifiable and must go through a registered competent-person scheme or building control.
Gas Safe Register	The official register of legally qualified gas engineers in the UK. Gas work must be done by a Gas Safe registered engineer — never a chatbot's advice.
EICR	Electrical Installation Condition Report — a periodic inspection and test of a property's fixed electrical installation, carried out and signed by a qualified person.
MTD / MTD-ITSA	Making Tax Digital — HMRC's digital record-keeping and reporting rules, in force for VAT and expanding to income tax self assessment for the self-employed on a phased timetable.
BS 7671	The UK's Wiring Regulations (IET Wiring Regulations) — the standard against which cable and circuit design must actually be calculated. Never a chatbot's approximation.

THE HONESTY LEDGER

● Shipped — measured, gate-clean.

🔬 Research — measured, partial; the gap is shown.

🔭 Vision — designed, honest; not yet built.

The bigger claim goes up a tier, never down. We show the eval beside the demo — the tiering is the credibility.

Get a free, tailored plan

Take the free five-minute readiness check and get three concrete next steps for your trade — what's worth setting up first, what to skip. No sales pitch.

</diagnose/quiz>

Nothing faked.

This guide was drafted with AI and verified by a named human. Quotes and figures are illustrative; safety rules (Gas Safe, Part P, BS 7671) always point to their official source. A tradesperson's document, on our spine.

