
OPERATIONS & AI ADOPTION

Breaking the scaling ceiling.

A family-run design-build firm rebuilds its operations on an AI foundation.

How an embedded AI partner took a five-person office off improvised, undocumented process — and gave it a documented operating system, one consolidated stack, and a team that builds its own AI skills.

SECTOR

Residential design-build · home services

ENGAGEMENT

Multi-phase embedded partnership, ongoing

SCOPE

Operations, stack consolidation, AI enablement

01 — THE COMPANY

A family-run firm that outgrew its own **operations**.

The client is a **family-run residential design-build firm** serving an affluent, fast-growing Sun Belt metro. Every project is fully custom, built for individual homeowners and moving through consultation, collaborative design, and construction.

The model is common in the trades and demanding to run. A small core team of about **five people** handled design, sales, estimating, scheduling, procurement, and client communication in house, while specialty subcontractor crews executed the build work. As the single point of accountability on every project, the office carries a heavy coordination load — quotes and takeoffs, permits, material orders, crew schedules, design revisions, and constant client updates, all running in parallel across multiple active jobs.

— THE INDUSTRY

The firm operates in a strong market. The US home improvement and residential renovation industry is estimated at roughly **\$600 billion in 2026** and continues to grow steadily, driven by an aging housing stock and homeowners choosing to upgrade rather than relocate. Design-build firms are a recognized and growing segment, prized for offering a single accountable partner across design and construction. That promise comes with a catch for a small shop: **every additional job multiplies the coordination work**, and the office scales far faster than a handful of people can absorb.

\$600B

US home improvement
market, 2026

~5

People in the core office team
at the start

10+

Disconnected platforms in the
old stack

02 — THE STARTING POINT

Strong demand, and **no system underneath it.**

Demand was strong and the team was overwhelmed. Taking on more work required hiring, but the business needed to scale before it could justify the hires. The company was **stuck at a linchpin point**.

Underneath the overload there was no system. When a homeowner reached out, the team scrambled to put a design together, then reverse-engineered it by hand into a bill of materials and a takeoff. Every job was improvised end to end, and every failure traced back to the same two roots: **manual entry and undocumented process**.

01 No SOPs — no documented systems or processes anywhere in the business.

02 No tracking of jobs, goals, or KPIs — each day meant fighting whatever fires came up.

03 Knowledge was siloed — some in the founder's experience, the deeper silo in the systems themselves.

04 Roughly ten disconnected platforms, assembled one convenient purchase at a time — none of which talked to each other.

05 Quoting lived in a legacy construction CRM, files split across two ecosystems, email across two providers, spreadsheets on their own.

The founders knew AI was likely the answer. They also knew they needed a partner to get there — one that would start with the operations, not the technology.

03 — WHAT AVOLIS BUILT

Fix the operations first. Then add the AI.

Bolting AI onto a broken foundation produces a faster broken foundation, so the engagement started where the real problems lived.

— PHASE 1 • OPERATIONAL FOUNDATIONS

Avolis implemented a **weekly team meeting rhythm and a goal-and-accountability structure** modeled on the popular EOS framework, then built a custom AI-powered operations dashboard — the first place the firm's jobs, goals, and KPIs had ever lived together. The team still runs on it today. Avolis also taught the executive team a repeatable method: take a problem, reverse-engineer it into a solution, and operationalize it as an SOP, using Claude as a thought partner to work through, document, and implement each one. The instinct was already in the building — this firm had been reverse-engineering designs into bills of materials by hand for years. Avolis **formalized that instinct into a documented, repeatable practice**, with the CEO personally driving the effort until every system in the business was documented.

— PHASE 2 • CONSOLIDATING THE STACK

With the foundation in place, Avolis rebuilt the tech stack. The whole company moved onto **Google Workspace** — one email system, spreadsheets in Sheets, files in one place. Job operations moved onto a robust construction-management platform chosen specifically because its API and MCP support made it a safe base for AI infrastructure. Avolis stood up a dedicated sales-and-marketing platform, wired the systems together with automations, and handled the full rollout: implementation, adoption, and training.

PHASE 3 • AI ENABLEMENT

The office runs through **one chat interface.**

With everything connected, Avolis trained the team on **Claude Cowork** so every member could drive the CRM, the financial software, and the sales-and-marketing tools through a single chat interface. Today the team builds its own AI skills. The flagship example is scheduling: with Avolis's guidance, the team created a skill that takes a job and reverse-engineers it into a complete Gantt chart, scheduling sub-crews across an entire multi-month build. The same documents the office once assembled by hand now run through Claude.

Team-built skills

A scheduling skill that turns any job into a full multi-month Gantt chart across sub-crews.

Documents through Claude

Permit analysis, blueprint write-ups, design RFQs, quotes, and takeoffs.

One interface

CRM, financials, and sales-and-marketing tools, all driven from a single chat.

Take a problem, reverse-engineer it into a solution, and **operationalize it as an SOP** — the method that turned a founder's instinct into a documented, repeatable practice.

04 — WINNING ADOPTION

Adoption is engineered, not assumed.

The technology was the easier half of the engagement. The harder half was getting a busy, skeptical team to change how it works — and one episode shows how Avolis approaches it.

Part of the enablement rollout was a **voice-dictation tool** that lets team members drive their AI workflows by speaking instead of typing. The team resisted it almost unanimously, for an understandable reason: nobody wanted to be the person talking out loud in a shared office.

Rather than mandating the tool, Avolis ran short, low-stakes exercises with the team, measuring how much faster their real daily work moved by voice compared to typing. The speed difference became impossible to ignore. **Adoption flipped on its own** — to the point that team members bought their own headsets so they could dictate comfortably at their desks.

Tools that teams are told to use get abandoned.

Tools that teams prove to themselves get defended.

05 — THE OUTCOME

A lean, tech-enabled business **built to scale.**

~2x

Headcount — nearly doubled since the engagement began

10 → 1

Scattered platforms replaced by one consolidated stack

100%

Of the team trained on AI to a high level

— WHAT CHANGED UNDERNEATH THE NUMBERS

The business changed shape

Work that once lived in the founder's head and in scattered tools now lives in **documented SOPs, a unified platform, and team-built AI skills** any member can run. Staff spend their time on jobs and clients instead of manual entry.

A foundation that extends itself

The company has an operational foundation designed to grow with it — and, just as important, **a team that knows how to extend that foundation itself** rather than depending on outside help for every change.

The next phase of the engagement will introduce **agentic workflows** that act on the team's behalf inside the systems it already runs on.

06 — WHAT THE ENGAGEMENT REPLACES

Four separate markets, one embedded partner.

A firm assembling this transformation piecemeal would be shopping in four separate markets. Benchmarked against current national market rates for each function, the typical alternatives look like this:

FUNCTION AVOLIS COVERED	TYPICAL ALTERNATIVE	EST. MARKET COST
Business operating system installation	EOS-style implementer	~\$36K–\$53K yr 1
Operational leadership & SOP buildout	Fractional COO	~\$60K–\$120K / yr
Custom operations dashboard	Custom dev agency	~\$20K–\$50K + upkeep
Stack consolidation, migration & integration	Systems integration firm	~\$15K–\$40K fees
Team-wide AI training & enablement	Corporate AI trainer	~\$15K–\$40K / engmt
Assembled independently, first year		~\$145K–\$300K

And the dollar figure understates the gap. Each vendor stops at the edge of its own deliverable — the implementer leaves a framework, the dev shop ships an app, the trainer runs the workshop. **None of them owns the connections between the pieces, and none owns adoption.** Avolis delivered the full scope as one embedded partner accountable for the outcome, including the part where the team actually changes how it works.

The comparison is deliberately conservative: it reflects functional coverage rather than actual purchases, uses the low-to-middle end of published market ranges, and excludes both software licensing and the coordination cost of managing multiple vendors.

07 — TECH STACK

The system, **under the hood.**

AI	Claude (Cowork) — single chat interface driving CRM, financial, and marketing tools; team-built skills for Gantt charts, permits, blueprints, RFQs, quotes, and takeoffs
JOB OPS	JobTread — construction management; chosen for its API and MCP support
SALES & MKTG	GoHighLevel — dedicated sales and marketing platform
WORKSPACE	Google Workspace — unified email, docs, and spreadsheets
VOICE	Wispr Flow — voice dictation driving day-to-day AI workflows
DASHBOARD	Custom AI-powered ops dashboard (jobs, goals, KPIs) — built in Lovable, deployed on Vercel with a Supabase backend
AUTOMATION	Zapier — automations connecting the platforms

Built on real work. Measured by **results.**

Embedded AI leadership at a fraction of building it in-house.
Let's find where AI pays off in your operations.

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