

The Contractor AI Field Guide

15 practical workflows. Five decisions AI should never own alone. One 30-minute starting plan.

15 WORKFLOWS
05 HARD LINES
30 MINUTES

01 / 13



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CONTRACTOR • AI OPERATOR





THE REAL PROBLEM

It is not “lack of AI.” It is the handoff.

Contractors lose time when information arrives in one place and the next decision lives somewhere else.

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- 01 Slow follow-up**
Good leads cool off while details move between calls, notes and inboxes.

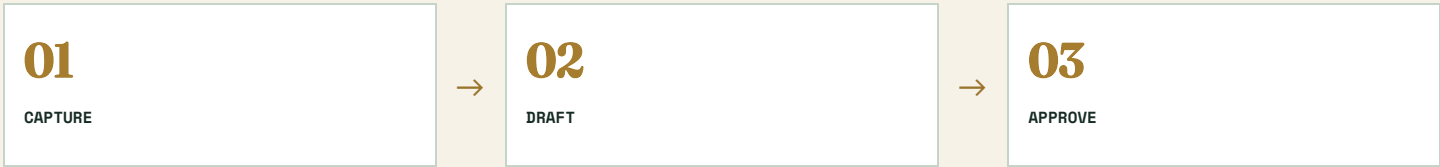
 - 02 Repeated admin**
The same facts get typed, summarized and chased more than once.

 - 03 No clear owner**
Automation fails when nobody knows who checks the draft or handles the exception.

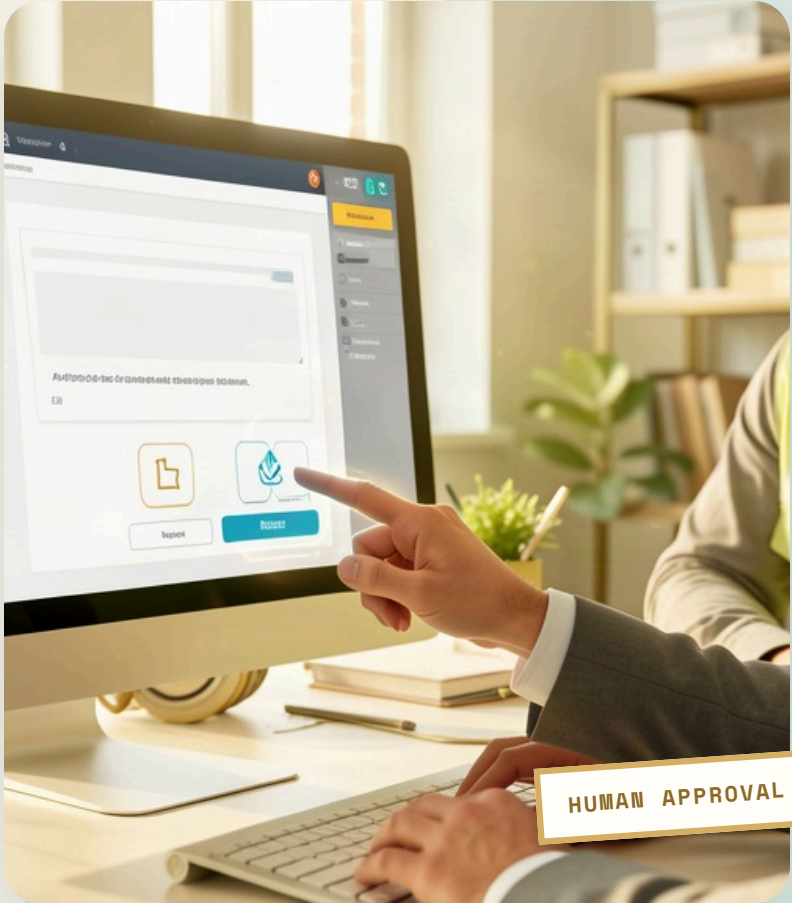
THE OPERATOR RULE

AI prepares.
Humans decide.

Give AI a narrow job. Give a person the final call.



Nothing customer-facing sends itself. Nothing safety-related becomes an AI decision.



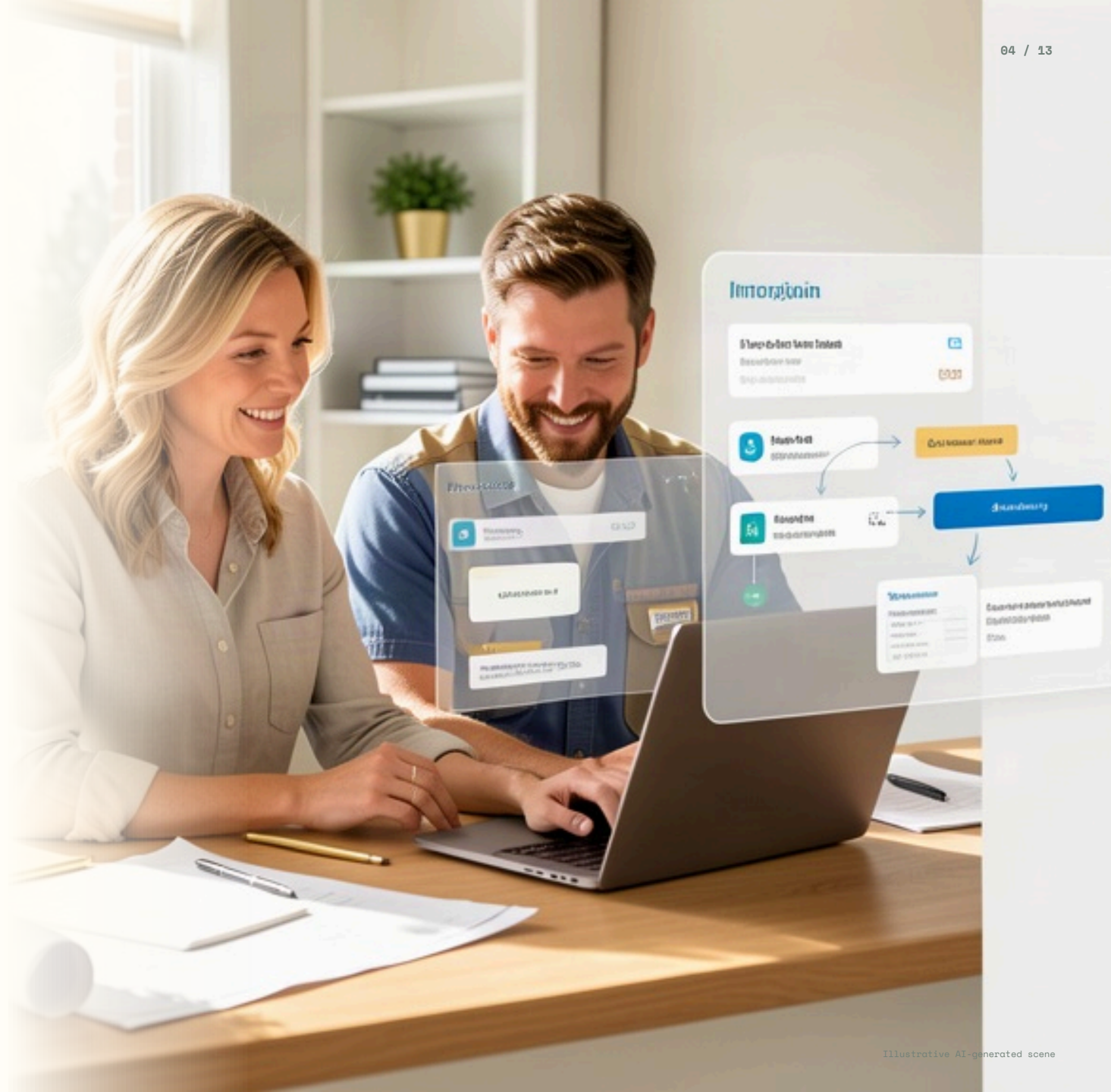
01

PRACTICAL WORKFLOW

Never lose the lead.

Turn scattered inquiries into one reviewable record.

TRIGGER	A call, form or email arrives.
AI PREPARES	Service, location, timing and missing questions.
HUMAN DECIDES	What gets saved and what reply—if any—gets sent.
USEFUL OUTCOME	Faster triage without invented facts or automatic messages.



02

PRACTICAL WORKFLOW

Estimate faster— not blindly.

AI can organize the work. Your estimator owns the number.

AI MAY	Structure site notes, allowances, exclusions and questions.
AI MUST NOT	Set final quantities, price, margin, tax or permit conclusions.
HUMAN DECIDES	Scope, assumptions, price and what becomes contractual.

USEFUL OUTCOME

Cleaner proposal preparation with visible judgment and fewer missing fields.



03

PRACTICAL WORKFLOW

Voice note in. Daily log out.

Let the crew talk naturally. Turn the note into a draft they can check.

CAPTURE	Work completed, issues, missing materials and tomorrow's plan.
AI PREPARES	A structured internal daily-log draft.
CREW LEAD CHECKS	Names, quantities, claims and anything the transcript missed.

USEFUL OUTCOME

Less end-of-day typing. Better records. The crew lead stays accountable.



FIVE HARD LINES

Some decisions stay human.

Before you use business data, confirm the purpose, authority, access, retention and human owner.



01

Final price

Quantities, margin, tax and allowances.

02

Safety + code

No inspections, clearances or permit rulings.

03

Contracts

No final scope, warranty or legal commitment.

04

Customer sends

Every message starts as a draft.

05

Secrets + payments

No passwords, keys, card data or unnecessary PII.

CHOOSE THE FIRST WORKFLOW

Pick the first workflow. Start with boring.

The best first workflow is frequent, clear and easy to reverse—not flashy.

01

RECENT

It happened in the last seven days.

02

REPEATED

It happens often enough to matter.

03

REVIEWABLE

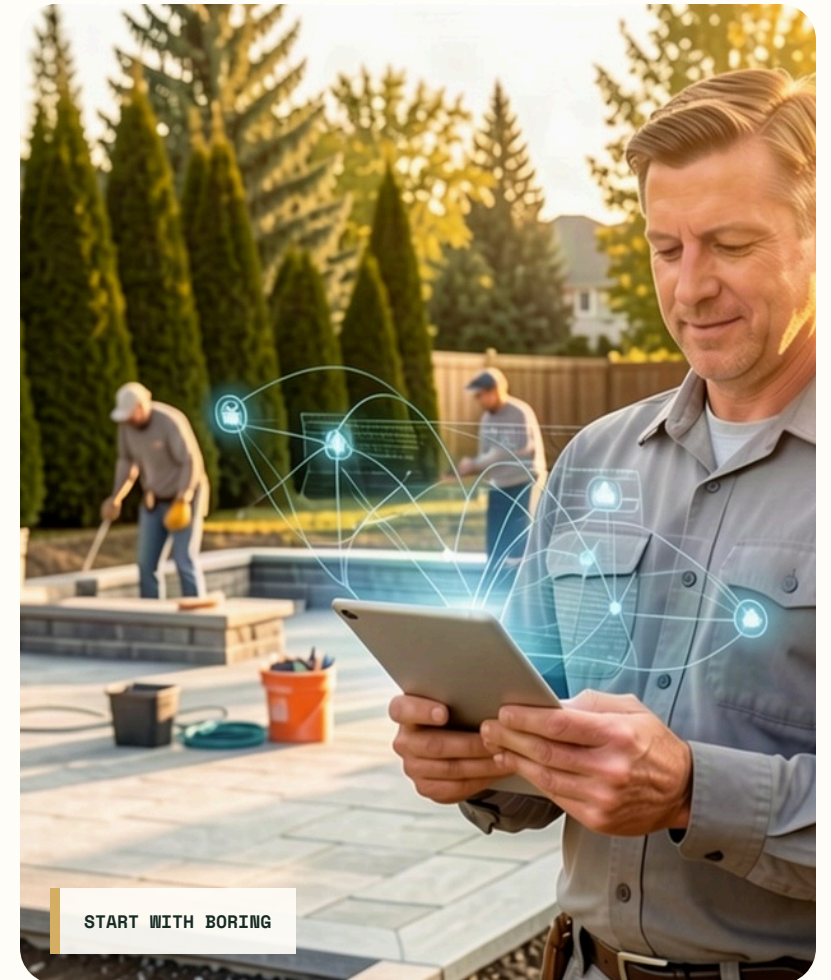
A person can check the output first.

04

MEASURABLE

You can track time, errors or queue age.

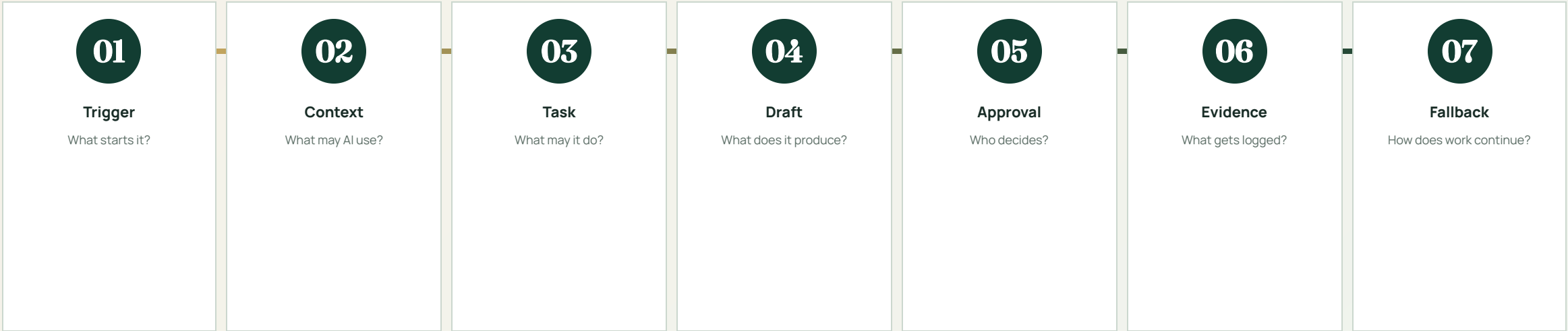
GOOD START: field note → internal draft → named reviewer.



THREE READY-TO-MAP BLUEPRINTS USE THIS STRUCTURE

Before you build the agent, write the job description.

The seven-part agent card makes ownership, evidence and fallback visible.



No owner + no fallback = not ready.



YOUR 30-MINUTE ACTION PLAN

Test it in
30 minutes.

Do not start with software. Start with the last time the work happened.

00-05	Choose one real occurrence.
05-12	Map how the work moves today.
12-18	Set the boundary and approver.
18-24	Choose one proof measure.
24-30	Test normal, missing and misleading inputs.



WHAT GOOD LOOKS LIKE

Useful. Visible. Still human.

The system supports the team. It does not replace responsibility.

- 01 A clear draft**
People know what AI prepared.
- 02 A named reviewer**
Someone owns the decision.
- 03 A visible record**
You can reconstruct what happened.
- 04 A manual route**
Work continues when the model fails.



CONTRACTOR AI OPERATOR

Put one workflow into operation.

The planned 30-day implementation lab for Ontario contractors.

- 01** Map one real workflow.
- 02** Build the smallest controlled version.
- 03** Keep customer-facing work behind approval.
- 04** Add logs, fallback and cost controls.
- 05** Measure whether the workflow actually improved.

Join the founding-cohort interest list on the page where you downloaded this guide.
Interest is not a purchase or commitment.

Sources + next move.

01	Privacy Commissioner of Canada AI, privacy, and your business	OPEN ↗
02	Government of Canada Getting consent to send email	OPEN ↗
03	NIST AI Risk Management Framework	OPEN ↗
04	NIST Generative AI Profile	OPEN ↗
05	OWASP Top 10 for LLM Applications	OPEN ↗
06	Statistics Canada AI use by Canadian businesses, Q2 2026	OPEN ↗

Pick one workflow from your last seven days. Map the trigger, draft, approver, evidence and fallback.



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