



## GAINS PROFILE

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**The best way to refer me is a 3-way text introduction.**

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**What I do:** Most service businesses are quietly losing hours to manual work without realizing it. Data entry. Repetitive tasks. Tracking leads in Excel. A team stretched thin keeping everything moving by hand. I build AI agents that take that work off their plate and keep operations running smoothly. I audit your operations, build the systems, and keep them running. You do not set up a thing. I take care of all of it for you.

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**Imagine gaining 20+ hours back in your week. How many more sales would you close? How many more customers could you serve? More done, with less busywork.**

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**You would not run a business without the internet. So why run one without AI?**

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### Who To Send Me

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In one sentence: a service business with 5 or more people whose team is stretched thin with manual work. If the owner is tired of slow follow-up and watching hours disappear into busywork, that is exactly who I would love to meet. Best fits:

- HVAC, refrigeration (HVAC-R), and plumbing companies
- Contractors and home service businesses
- Pool and lawn care businesses
- Roofing companies

### Refer Me When You Hear This

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If one of these comes up in conversation, that is your cue to text me in:

- *"My front desk is drowning."*
- *"We lose leads because we follow up too slow."*
- *"My team wastes hours on the same manual tasks every day."*
- *"I know I need AI but I am not sure where to start?"*
- *"I wish I could clone my best CSR."*

### The Easiest Way To Refer Me

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Drop me into a 3-way text with one simple line: **"You two should talk."** That is all you need to do. No long email, no warm-up call. I will take it from there and take great care of them.

### What I Have Already Built

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Real systems, shipped for real businesses:

- **Dade Engineering.** End-to-end quote-to-production automation across 8+ platforms, plus a custom rep portal that surfaces live quote and production data to the sales team.
- **Home services company.** Unified four service lines (roofing, solar, generator, Solar Soft) into one system, with auto-routing by service line and a 60-day nurture rescue for stalled leads.
- **Wealth management RIA.** Built cold email at scale plus targeted LinkedIn outreach via an AI to their ideal audience, with pattern-interrupt subject lines.
- **Thomas J. Finnegan Co.** A custom AI team manager: an AI agent that helps run day-to-day operations and tracks the team for an HVAC-R manufacturers' rep firm in business since 1974 and covering 12 states.
- **Custom KPI dashboards.** Real-time dashboards that track the numbers that matter, including pipeline, bookings, and individual sales rep performance, all in one place.

## Goals

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- Refer someone I know to the right person in this group every week.
- Do 10 new AI audits each month.
- Help 100 businesses implement AI in their business over the next 12 months.
- Meet more service business owners who want to grow without hiring more people.

## Interests

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- Traveling. I have been to 15 countries.
- My pitty mix, Pinky.
- Staying ahead of every new AI tool and trend.

## Networks

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- Member of BNI Referral Masters.
- Member of the South Tampa Chamber.
- Connected to service business owners across home services, refrigeration, and more, so I refer business out, not just take it in.
- Connected to entrepreneurs and authors in the AI and business world.

## What I Am Great At

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- AI operations audits: I find exactly where a business loses time and money.
- Implementing AI agents that handle data entry, lead tracking, and repetitive workflows.
- Follow-up systems that turn cold leads into booked calls.
- Optimizing it all so the systems keep running and improving on their own.

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*If you know someone whose team is stretched thin with busywork, you already know my perfect referral. Text us together and I will take it from there.*