

A stylized, isometric illustration of a construction site. It features several workers in hard hats and safety vests working on a structure made of large, light-colored blocks. In the background, there are tall, thin structures resembling rebar or scaffolding, and a large, white, dome-shaped object. The scene is set against a warm, orange-toned sky with a large, glowing sun or moon.

Stucco Contractor Business Automation

Construction & Contracting

Automation

Lead Tracking

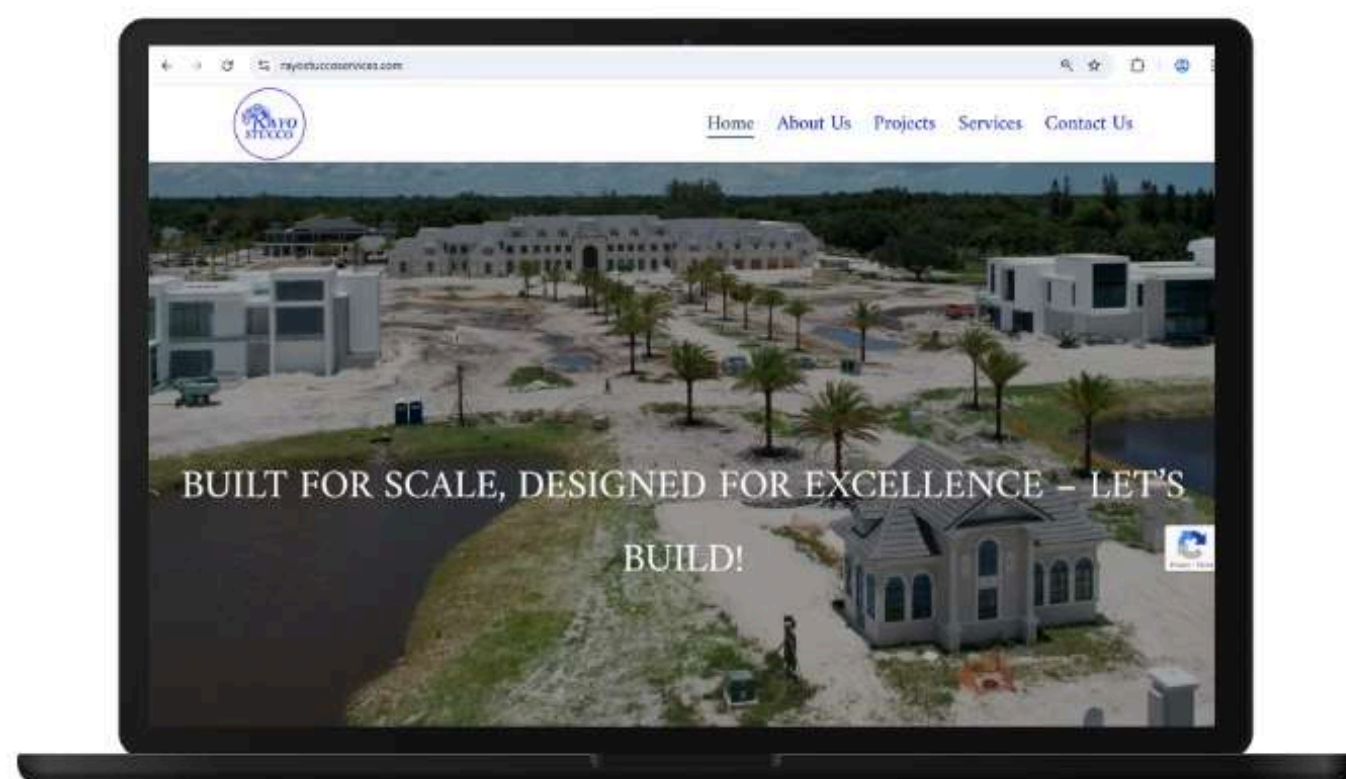
Data Analytics

Tracking System

Workflow modernization

PROJECT OVERVIEW

We engineered an end-to-end **automation system** for a stucco contractor to replace fragmented, manual workflows with a streamlined digital process. From **capturing leads** and scheduling crews to real-time **job tracking, invoicing**, and **payment follow-ups**—every step was restructured for speed, accuracy, and scale. The result: a centralized, intelligent platform that reduced admin load, cut delays, and positioned the business for sustainable growth.



CLIENT PROFILE



USA



No. Of Employees: 15

Rayo Stucco Services is a trusted contractor offering residential and commercial stucco solutions across Texas. As their project load grew, they needed a smarter way to manage leads, schedules, and invoicing. The goal was to streamline operations through automation and support business growth without adding administrative strain.

REQUEST BACKGROUND

Our client faced challenges in managing leads, tracking job statuses, handling invoices, and scheduling workers. They relied on spreadsheets and manual coordination, which resulted in inefficiencies, delays, and missed follow-ups.

The existing process involved:

- Manually entering leads into Google Sheets.
- Tracking jobs through email threads and calls.
- Sending invoices manually and following up on overdue payments.
- Assigning workers via text messages with no centralized scheduling system.

The client sought a **fully automated system** to streamline these tasks, reduce errors, and enable growth without additional administrative overhead.



CHALLENGES

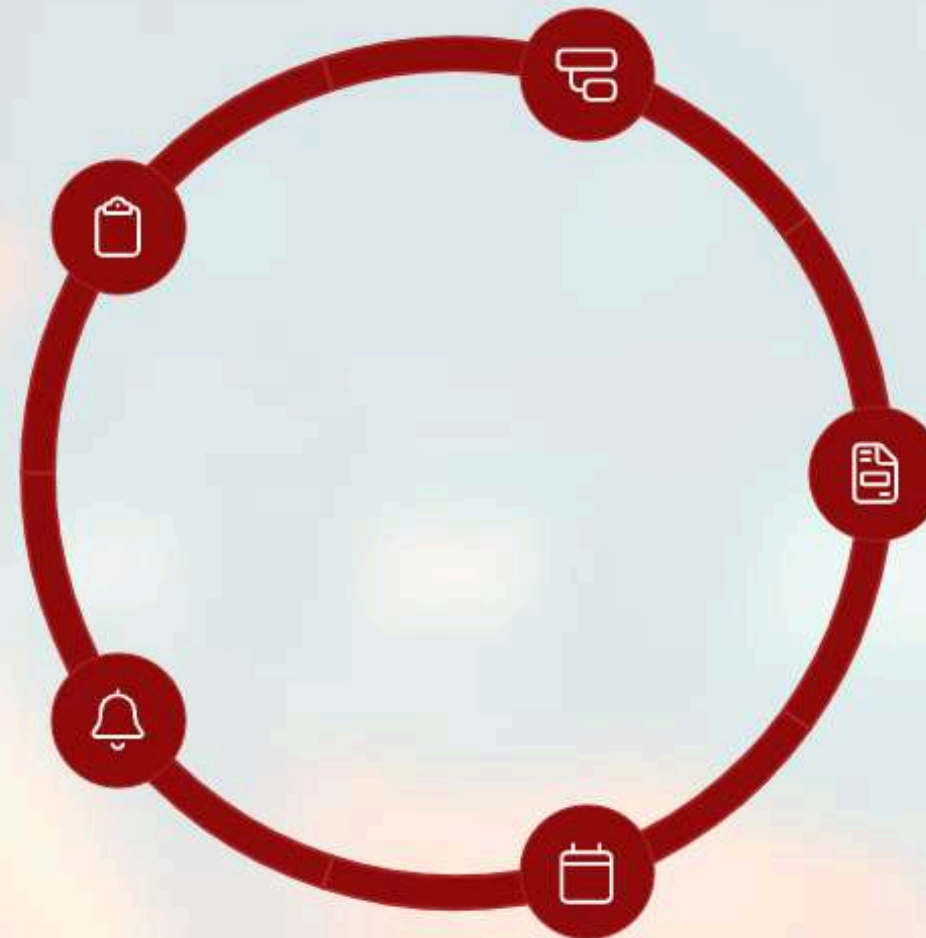
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Manual Lead Tracking

Leads were collected through web forms and manually transferred to spreadsheets.

No Real-time Notifications

Clients and workers lacked automated updates on job progress and schedules.



Job Status Updates

Lack of a centralized system led to inefficiencies in tracking job progress.

Invoicing Delays

Manual invoice generation and follow-ups led to payment delays.

Worker Scheduling Issues

Assignments were done via calls and messages, making it hard to track availability.

The goal was to automate these processes while ensuring scalability and accuracy.

SOLUTION

Technology Stack



Duration & Resources

Time Taken: 6 weeks

Resources: 3 specialists

Our team implemented a **workflow automation system** using **Zapier and Google Sheets App Script** to streamline operations. We conducted an audit of the client's existing workflow and built a scalable, integrated solution:

1

1. Automating Lead Capture & Storage

Trigger: Webhook receives new lead data.

Automation (Zapier):

- Zapier captures lead data and updates Google Sheets.
- Automated confirmation emails are sent to new leads.

Outcome: Leads are instantly recorded, eliminating manual data entry.

2

2. Job Tracking & Real-time Updates

Trigger: Job status changes in Google Sheets.

Automation (Zapier + Google Sheets App Script):

- Zapier updates job progress.
- Clients and workers receive status notifications.

Outcome: Real-time visibility into job progress, reducing delays.

3

3. Automating Invoices & Payment Reminders

Trigger: Job marked "Completed" in Google Sheets.

Automation (Google Sheets App Script):

- Generates an invoice in PDF format.
- Emails the invoice to the client.
- Sends payment reminders for overdue invoices.

Outcome: Faster invoicing and improved payment collection.

4

4. Worker Scheduling & Notifications

Trigger: New job assigned in Google Sheets.

Automation (Google Sheets App Script + Twilio API):

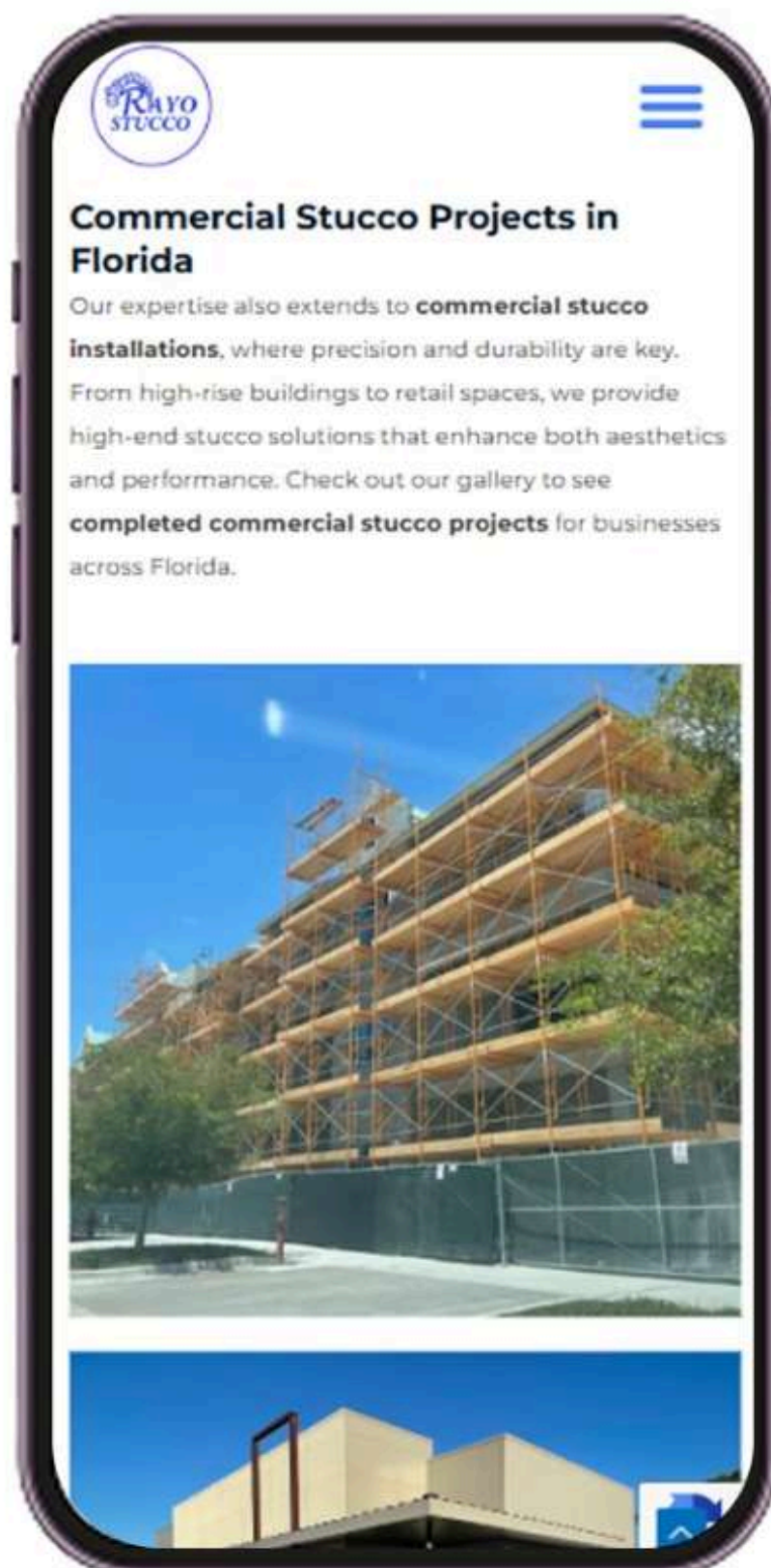
- Sends SMS notifications to assigned workers.
- Updates scheduling in real time.

Outcome: Workers receive instant job assignments, improving efficiency

GOALS

Following are the goals that needs to be achieved:

- 1 Implement an automated lead management system**
Integrated with Google Sheets to streamline lead capture and processing.
- 2 Set up a centralized job tracking system**
Enabling real-time status updates for all stakeholders.
- 3 Automate invoicing and payment reminders**
To improve cash flow and reduce administrative burden.
- 4 Develop a worker scheduling system**
With automatic SMS/email notifications to improve coordination.
- 5 Enable data-driven decision-making**
Using analytics and reporting to optimize business operations.



OUTCOMES

90%

Reduction in Lead Entry Time

From up to 30 minutes to instant recording.

85%

Faster Job Tracking

With real-time updates replacing email/call-based coordination.

80%

Reduction in Invoice Processing Time

Through automated PDF generation and delivery.

100%

Error Reduction

Eliminated manual data entry mistakes



CLIENT FEEDBACK



"This setup has made a huge difference for us. We're not stuck in spreadsheets or forgetting to follow up with customers. Everything from tracking jobs to sending invoices just works—and that's been a big help in growing the business."