AI starter kit for tradies: where to start, what to know and the first five jobs to hand over (2026)

The short answer

To start using AI in a trade business, install one free chat assistant (ChatGPT, Google Gemini, Microsoft Copilot or Claude), switch on the AI already in your job app, and get in the habit of talking your notes into your phone instead of typing them. Give the AI your business details once, in a ChatGPT Project, a Claude Project or a Gemini skill, so every answer already knows your trade, area and tone. Then hand over five jobs in this order: quote descriptions from site notes, quote follow-ups, payment reminders, review requests and replies, and social posts. The free plans cover all five; the cheapest paid plans in Australia are $7.99 a month for Google AI Plus and $13 a month for ChatGPT Go, as at November 2026. Keep customer details out, check every figure, and never use it for safety, legal or tax decisions.

Most of what's written about AI for small business owners is about offices. A trade business is different: the paperwork happens in the ute, at night, on a phone. This kit is the short version of everything in the Tradie Toolbox: what AI does well and badly for a tradie, the three tools to start with, how to set it up once so it sounds like you, the first five jobs to hand it, and the rules worth knowing. Each section links to the full guide when you want more.

1. What AI is good and bad at in a trade business

An AI chat assistant is a fast writer that has read a huge amount but knows nothing about your business until you tell it. Treat it like a sharp new office person on day one: quick with words, needs your facts, and every answer gets checked before it goes out.

Good at	Bad at
Turning rough site notes into a tidy quote description	Knowing what materials cost at your supplier this week
Polite, firm customer texts and emails, in seconds	Getting sums and GST right every time
Explaining a job to a homeowner without jargon	Australian Standards, wiring rules, gas rules and certificates
Review requests, review replies and social captions	Contract, licensing and consumer law, which differ by state
Job ads, checklists and one-page summaries of long specs	Doing anything by itself: it won't answer the phone or chase a quote

OpenAI's own help pages say ChatGPT can invent facts and sources that don't exist, and tell users to check important information.

In plain terms: it's a writer, not a worker. It drafts when you ask, and you stay the one who decides and sends.

The office jobs AI can do in a trade business
The AI mistakes tradies make

2. The kit: three things to start with

You don't need to buy anything to start. Pick one free chat assistant that fits the phone and email you already use, check what your job app already does, and turn on your phone's dictation.

- The dictation habit: finish the job, sit in the ute before you drive off, tap the microphone on the keyboard and talk the job through. Paste the text into your chat app and ask for the write-up.
- One chat app is enough. A second free one is a handy backup for the day the first one hits its limit.

Tool	What it does for you	Price (as at November 2026)	Best for
ChatGPT (Free plan)	Writes quote wording, customer texts and emails, job ads. Unlimited everyday text chats; uploads, image making and voice are limited	$0. Go $13 a month, Plus $29.99 a month in Australia's App Store	iPhone users and anyone wanting the best-known app
Google Gemini (free)	Writing, plus Gemini Live: talk to it and show it things through the camera	$0. Google AI Plus $7.99 a month	Android, Gmail and Google Drive users

Tool	What it does for you	Price (as at November 2026)	Best for
Microsoft Copilot (free app)	Chat, voice and image making. Microsoft 365 Personal adds Copilot inside Word, Excel and Outlook	$0. Microsoft 365 Personal AU$16 a month or AU$159 a year	Anyone already paying for Microsoft 365
Claude (Free plan)	Longer writing, and reading uploaded PDFs like tenders and specs	$0. Pro $30 a month in Australia's App Store	Long documents
The AI in your job app	ServiceM8 writes quote and invoice descriptions, emails and texts on every plan (10 assists a day free). Tradify's SmartWrite and SmartRead are on its Plus plan. Fergus Assistant answers plain-English questions about your jobs	ServiceM8 Free $0, Starter $29 a month including GST. Tradify Plus $62 per user a month plus GST	Quote and invoice wording without copying and pasting
Phone dictation (iPhone, Gboard, Samsung Keyboard)	Talk instead of type, in any app. Say "comma", "full stop" or "new line" as you go	Free	Job notes in the ute, pasted into the chat app

ChatGPT and Claude prices are from Australia's Apple App Store; buying on their websites may bill in US dollars. Named as well-known general tools, not endorsements. Prices and free limits change, so check the app.

In plain terms: one free chat app, the AI you already pay for in your job app, and your voice. That covers the writing for most sole traders.

Free AI tools for tradies: the limits, and when to pay
ChatGPT vs Copilot vs Gemini for tradies
The AI already in ServiceM8, Tradify, Fergus and others

3. Set it up once, so it sounds like you

Every fresh chat starts from zero unless you give it a permanent briefing. Write your business details down once, paste them into a saved helper, and every answer after that already knows your trade, area, terms and tone.

Where to put it: a ChatGPT Project (on every plan, including free), a Claude Project (free accounts get up to five) or a Gemini skill (Google is replacing Gems with skills). New custom GPTs can only be built on ChatGPT's business plans now, so on a personal plan use a Project.

- Step 1. Download the free LeadAI Tradie AI Office Setup Pack (a plain text file, link in the downloads block below).
- Step 2. Fill in the MY BUSINESS DETAILS section: trade, ABN, licence numbers, service area, hours, services, what you don't do, payment terms, deposit policy and tone.
- Step 3. Create a ChatGPT Project, Claude Project or Gemini skill, and paste the whole file into its instructions box.
- Step 4. Upload your price list as a file, so the AI uses your numbers and never makes them up.
- Step 5. Test it with a real job from last week, names removed, and add a rule for anything it gets wrong.

In plain terms: the time you put into the business details is what makes every later answer usable. Leave customer names and numbers out of the files.

Step by step: ChatGPT Projects, Claude Projects and Gemini skills
The business facts sheet and FAQ list any AI tool needs

4. The first five jobs to hand over, in order

Start with the writing that costs you evenings and loses you money when it doesn't get done. Do them in this order: each one builds the habit for the next. Fill in the [brackets], use [Customer] instead of names, and read every answer before it goes out.

- Job 1. Quote descriptions from your site notes: the job you do most and like least.
- Job 2. Quote follow-ups: the quote that goes quiet is the job you lose.
- Job 3. Payment reminders: firm, polite and sent on time.

- Job 4. Review requests and review replies: the reviews that help people find you.
- Job 5. Social posts from job photos: a steady trickle of local proof.

Job 1. Quote description from site notes (dictate the notes, then paste them in)

I'm a [trade] in [suburb or region]. Turn my site notes into the job description for a quote. Use three headings: What we'll do, What's included, What's not included. Dot points, plain Australian English, written for a homeowner, under 150 words. Don't add prices or anything that isn't in my notes. If something is unclear, ask me before you write.

Notes: [paste your dictated notes, e.g. "remove old vanity, supply and fit 900 wall-hung vanity customer supplied, new mixer, cap old waste, tiles stay"]

Job 2. Quote follow-up text

Write a short, friendly follow-up text to [Customer] about the quote I sent [last Tuesday] for [an exterior repaint of a weatherboard house]. One line reminding them what it covered, one line offering to answer questions or adjust the scope, no pressure, no discount. Under 50 words. Sign off as [Dave, Smith Painting].

Job 3. Payment reminder (polite, then firm)

Write two payment reminder texts for invoice [number] for [$X including GST], for [blocked drain clearing at Customer's place]. Version 1: friendly, the invoice is [7] days overdue, with how to pay: [bank transfer details go here, I'll add them]. Version 2: firm but polite, [21] days overdue, asking them to pay or call me to sort out a payment plan. Each under 60 words. No threats, no legal language.

Job 4. Review request and a review reply

1. Write a short text asking [Customer] for a Google review after we finished [their switchboard upgrade]. Thank them for one specific thing [they had the dog sorted and the power off on time], one line asking for a review, and [the review link]. Under 45 words.

2. Write a reply to this review for our Google Business Profile. Thank them, mention the job in a few words, no customer names, no sales pitch, under 50 words.
Review: [paste the review]

Job 5. Social post from a job photo

Write a Facebook and Instagram post for my [landscaping] business about this job: [new paved courtyard and garden beds, Ascot, 3 days, the old lawn was mostly bindis]. Under 40 words, friendly, local, mention the suburb not the street, no claims I haven't given you, up to three hashtags at the end. Give me two versions.

In plain terms: once these five run on your saved helper, most of your office writing is a dictated note and a read-through.

Turn a voice note into a quote
How to follow up quotes
AI review replies for tradies
50 AI prompts for tradies

5. Using it from the phone, by voice

- All four chat apps have phone apps you can talk to. ChatGPT’s voice icon sits in the message bar; free plans get limited voice time, Go and Plus get up to 3 hours in a rolling 24 hours.
- Gemini Live, Gemini’s talk-back mode, is on the free plan, and you can point the camera at a part or a label while you talk.
- ChatGPT works in Apple CarPlay on supported iPhones. Set it up before you drive and don’t touch the phone while the vehicle is moving: mobile phone road rules differ by state.
- Phone dictation doesn’t use up the chat app’s voice allowance, so dictate notes and save voice chats for when you want to talk it through.
- Voice mishears numbers and product names. Read measurements and prices on the screen before anything goes out.

AI on your phone, for tradies
Voice typing apps for tradies

6. What to know before you rely on it

- Customer details: write [Customer] and [Address] and fill them in yourself in your quoting software. Australia's privacy regulator, the OAIC (Office of the Australian Information Commissioner), recommends as best practice that businesses don't enter personal information into publicly available AI chatbots.
- Training settings: turn off "Improve the model for everyone" in ChatGPT (Settings, then Data controls), Gemini History in Gemini, and Model Improvement in Claude (Settings, then Privacy).
- Every figure: check prices, totals, GST and measurements on a calculator or in your quoting software. The AI writes; your software does the sums.
- Never for safety, legal or tax decisions: electrical and gas compliance, Australian Standards, contract terms, licensing, deposits and tax. Check with the standard, your state regulator, your lawyer, your accountant or the ATO (Australian Taxation Office).
- Australian rules still apply to what you send: marketing texts and emails need your business name and an easy opt-out, and what you promise a customer is your promise, whoever drafted it.
- Who owns the output: each app's terms of use say what you can do with what it writes and makes, so read them for the app you use. Either way, you're the one sending it, so treat every draft as your own words.

In plain terms: write the job, not the customer, and check anything with a number or a rule in it.

AI and your customers' privacy: what tradies need to know
Consumer guarantees for tradies

7. Costs at a glance

Setup	What's in it	About a month	About a day
Free	A free chat app, phone dictation, ServiceM8 Free (30 jobs a month, 1 user)	$0	$0
Cheapest paid chat app	Google AI Plus $7.99 a month, or ChatGPT Go $13 a month	$7.99 to $13	About 27 to 43 cents
Main paid chat app	ChatGPT Plus $29.99, Claude Pro $30 or Google AI Pro $32.99 a month	About $30 to $33	About $1
Solo kit	ChatGPT Go, ServiceM8 Starter ($29 including GST) and Solo by MYOB ($99 a year)	$50.25	About $1.65
On Microsoft 365 for business	Copilot Business add-on, per user, on top of a Microsoft 365 business plan	AU$37.68 per user, plus GST	About $1.24 per user, plus GST

ChatGPT and Claude prices from Australia's Apple App Store; Gemini, Microsoft and ServiceM8 from their Australian pages. Microsoft's business price excludes GST (the 10% goods and services tax). Whether a subscription is tax deductible depends on your situation: check with your accountant.

In plain terms: pay only when the same free limit stops you most working days. If a $13 plan saves you one evening of paperwork a month, it has paid for itself.

What an AI tool kit costs: three stacks, priced

8. The start plan, step by step

- Step 1. Install one chat app from the kit table, using the one that fits your phone and email.
- Step 2. Turn off model training in its privacy settings.
- Step 3. Turn on dictation on your phone and use it for your next job notes.
- Step 4. Open your job app and find its AI button. Try it on your next invoice description.
- Step 5. Fill in the setup pack and paste it into a ChatGPT Project, Claude Project or Gemini skill. Upload your price list.
- Step 6. Hand over Job 1: your next quote description, from dictated notes.
- Step 7. Add Jobs 2 and 3: quote follow-ups and payment reminders, every one read before it goes.

- Step 8. Add Jobs 4 and 5: review requests and replies, and a post from your best job photo.
- Step 9. Keep a note of every mistake it makes and turn each one into a new rule in your instructions.
- Step 10. When your prices change, replace the price list file, with the date at the top.

In plain terms: one app, one setup, then one job at a time. Add the next job when the one before it runs without fixes.

How to use AI in a trades business
Starting a trades business with AI

9. When to move from DIY tools to AI staff

Chat apps write when you ask. When the gap is calls you miss and quotes nobody chases, a better prompt won't fix it. That's when AI staff make sense: LeadAI's Anna answers calls and books jobs, Emily follows up new enquiries and quotes, Carol chases invoices by phone and text, Jenny asks for reviews and referrals, and SAM does paperwork, quotes and invoices by voice. They cost from about $2.08 a day each on the Growth plan, plus GST, say they're AI when asked, and handle legal calling hours and opt-outs automatically. Over 100,000 LeadAI calls have gone to Australian trade businesses.

See what LeadAI's AI staff do
Missed call calculator
LeadAI pricing

10. Free downloads

Keep the kit on your phone or print it for the office. All free, no sign-up.

- AI Starter Kit for Tradies (PDF): this guide as a printable file.
- Tradie AI Prompt Library (PDF or Word): prompts for quotes, follow-ups, payments, reviews, marketing and hiring. Add it to your Project or skill as a knowledge file.
- Tradie AI Office Setup Pack (plain text): the business details to fill in and the instructions to paste into a ChatGPT Project, custom GPT, Claude Project or Gemini skill.

Download the AI Starter Kit for Tradies (PDF)
Download the Tradie AI Prompt Library (PDF)
Download the Tradie AI Prompt Library (Word)
Download the Tradie AI Office Setup Pack (text)
Browse the Tradie AI Prompt Library online

Questions tradies ask

Where do I start with AI in my trade business?

Install one free chat app (ChatGPT, Gemini, Copilot or Claude), turn off model training in its settings, and give it one job: turning your dictated site notes into quote descriptions. Paste your business details into a ChatGPT Project, Claude Project or Gemini skill once, then add follow-ups, payment reminders, reviews and social posts one at a time.

Is ChatGPT free?

Yes. The free plan gives unlimited everyday text chats, with limits on uploads, image making, voice and memory. In Australia's App Store, ChatGPT Go is $13 a month and Plus is $29.99 a month, as at November 2026.

ChatGPT, Claude, Gemini or Copilot: which should I use?

They all write well. Pick the one that fits what you already use: Gemini for Android and Gmail, Copilot if you pay for Microsoft 365, ChatGPT for the best-known app with voice and CarPlay, Claude for long documents like tenders. Start on the free plan and keep the one you reach for.

Is it safe to put customer details into AI?

Best not to in public chat apps. The OAIC (Office of the Australian Information Commissioner) recommends businesses don't enter personal information into publicly available AI chatbots. Write [Customer] and [Address], fill them in yourself in your quoting software, and turn off model training in the app's settings.

Will AI replace my office person?

A chat app won’t. It drafts when someone asks, so it makes an office person faster rather than replacing them. It doesn’t answer the phone, ring back missed calls or chase quotes and invoices by itself. AI staff do those jobs, which frees an office person for the work that needs a person.

Can AI quote for me?

It can write the job description, inclusions and exclusions from your notes. Put the prices in from your own price list, check the GST and totals, and send the quote from your quoting software. Tell it never to invent a price and to flag anything missing.

What does AI cost a tradie?

From $0 on free plans. The cheapest paid chat plans in Australia are Google AI Plus at $7.99 a month and ChatGPT Go at $13 a month; the main paid plans are about $30 to $33 a month. A sole trader kit with ChatGPT Go, ServiceM8 Starter and Solo by MYOB is about $50 a month, as at November 2026.

Do I need a computer?

No. ChatGPT, Gemini, Copilot and Claude all have phone apps, and you can create and use a ChatGPT Project on the phone. A computer helps for long documents, and Microsoft’s Copilot agents can only be built on a computer.

Can I use AI on my phone and by voice?

Yes. Your phone’s dictation turns talk into text in any app for free. ChatGPT has voice mode and works in Apple CarPlay on supported iPhones, and Gemini Live, on Gemini’s free plan, lets you talk and show it things through the camera. Check numbers on the screen, because voice mishears them.

What’s a custom GPT, a Project or a Gem?

They’re saved helpers that keep your instructions and files, so every chat already knows your business. A ChatGPT Project works on every plan; new custom GPTs can only be built on ChatGPT’s business plans. Claude has Projects on its free plan. Google is replacing Gemini Gems with skills: personal-account Gems became read only from 17 November 2026 and are removed on 17 December 2026.

What should I never use AI for?

Electrical or gas compliance, Australian Standards, safety calls, contracts, licensing, deposits and tax. AI can invent rules and sound sure. Go to the standard, your state regulator, your lawyer, your accountant or the ATO. And never let it send anything to a customer without you reading it.

How do I get my business to show up in ChatGPT answers?

AI search tools build their answers from business listings, reviews, your website and directories. Keep your Google Business Profile complete, get steady reviews and reply to them, say plainly on your website what you do and where, and keep your details the same everywhere. Our guide on getting found in ChatGPT and AI search has the full checklist: /guides/get-found-in-chatgpt-ai-search-tradies.