

Business Context Document

[Your Company Name] — System Description

This document describes how your business runs in plain English. It is the starting point for building your AI system, your Notion workspace, and your live dashboard. Fill out every section as honestly and specifically as you can. The more detail you give, the better Claude can reason about your business.

When you're done, paste the whole document into Claude and say: *"This is my business. Help me build a Notion workspace and dashboard based on this."*

The Business

Company name: [What is your company called?]

What you do: [In one or two sentences — what type of work do you do? Residential? Commercial? What trade?]

Where you operate: [City, region, or area you serve]

How big is the business: [How many people on the team? Roughly how much revenue per year?]

Who runs it day to day: [Is that you? Do you have a foreman or office manager who handles operations?]

The People

List every person on your team. Include yourself. Be specific about what each person actually does and what they cost you per hour — this is what every labour cost calculation will be built on.

NAME	ROLE	WHAT THEY DO DAY TO DAY	HOURLY COST TO THE BUSINESS
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Questions to answer:

- Who manages the crew on site when you're not there?
- Who handles scheduling? Is it you, a foreman, or someone else?
- Do you use subcontractors regularly? How do you track their cost?
- Do any of your people have variable rates (apprentices who move up, overtime, etc.)?

The Work

Describe how a job moves through your business from start to finish. Be specific — this becomes the process your AI system understands and tracks.

How does a new job start? [How do you find out about it? Who does the estimate? How do you decide to take it on?]

How do you price a job? [Do you use fixed pricing, time and material, or a bid? How long does an estimate take?]

What happens once a job is sold? [Who schedules it? How do you assign crew? How far in advance do you plan?]

What does a typical workday look like on a job? [Who shows up, what do they do, who reports back to you and how?]

How does a job end? [What triggers the invoice? How do you collect? What does "done" look like?]

How long is a typical job? [Do most jobs take a day? A week? Several months? What's your mix?]

How many active jobs do you usually have at once? [Give a rough number]

The Money

These four numbers determine whether a job was profitable. Fill these in as specifically as you can — this is what your dashboard will track.

Contract Value

What do you call the total amount a client agrees to pay? How is this set — fixed price, estimate, or open-ended?

Labour Cost

How do you calculate what your crew costs on a job? (Hours worked × hourly rate per person — confirm this is how you think about it, or describe your actual method)

Material Cost

What goes into your material cost? (Equipment, parts, supplies, rentals, subcontractors?) How do you currently track this — receipts, QuickBooks, something else?

Gross Profit

What margin do you expect on a healthy job? What's the number that tells you something went wrong?

- Healthy job = above _____%
- Warning sign = below _____%
- We have a real problem = below _____%

Other costs you track per job: [Permits? Inspections? Vehicle costs? List anything that affects whether a job made money]

The Problems

Be honest here. These are the things your AI system is going to help fix. The more specific you are, the better the system can be designed around your actual pain points.

Time tracking: [How does your crew track hours right now? Paper, text, spreadsheet, app? What goes wrong?]

Material costs: [How do you capture what was spent on a job? Where do receipts go? When do you find out the real cost?]

Job visibility: [When do you find out a job is over budget or behind schedule? Day 10 or day 45?]

Scheduling: [How do you know who is available and where they need to be? What breaks down?]

Client communication: [How long does it take to send a client update? What information do you need to pull together?]

Invoicing: [How long after job completion does the invoice go out? What slows this down?]

Anything else: [What is the thing that costs you the most time every week that shouldn't?]

What Good Looks Like

If your system worked perfectly, what would your Monday morning look like? What information would be waiting for you? Fill this in specifically — this becomes the brief for your live dashboard.

Every Monday morning I want to know:

- Which jobs are active and what their status is
- Which jobs are trending over budget or behind schedule
- Total hours logged last week and labour cost per job
- What materials were purchased and on which jobs
- Who is available this week and who has time off
- Any invoices that haven't gone out yet
- [Add anything else that matters to you]

The one question I want to be able to ask Claude at any time: [Example: "Is the Henderson job still on track?" or "What did my crew work on this week?"]

The thing that takes me the longest every week that I want to be automated: [Example: "Writing client update emails" or "Figuring out which jobs made money"]

Your Current Tools

List every tool your business uses right now. Claude will use this to understand what already exists and what needs to connect.

TOOL	WHAT YOU USE IT FOR	HOW IMPORTANT IS IT (1-10)

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Examples to consider: QuickBooks, Jobber, ServiceTitan, CompanyCam, Google Calendar, Outlook, Excel, WhatsApp, paper timesheets, etc.

The Tables Your Business Needs

Based on everything above, list the five types of information your business needs to track. Use the Redline Mechanical example as a guide — most contractor businesses need these same five tables, but rename or adjust them to match how you actually talk about your work.

Table 1 — Jobs / Projects

What do you call a piece of work? (Job? Project? Service call? Contract?) What information does every job need? (Client name, value, dates, status, assigned crew?)

Table 2 — People / Employees

Who needs to be in the system? Just employees, or subcontractors too? What information matters for each person? (Name, role, rate, contact info?)

Table 3 — Time / Timesheets

How do you want the crew to log time? (Per day? Per task? Per job?) What should they include? (Hours, a note about what they did, materials used?)

Table 4 — Costs / Expenses

What types of costs need to be tracked? (Materials, equipment rental, fuel, subcontractors?) Who logs expenses — the crew, you, or both?

Table 5 — Scheduling / Availability

How far ahead do you schedule? Do you need to track time off, sick days, or just job assignments?

Anything Else Claude Should Know

Use this section for anything that doesn't fit above — seasonal patterns, how you handle warranty work, key clients, things that make your business different from a typical contractor.

[Write freely here. Think of this as explaining your business to a new hire on their first day.]

Document complete. Paste this into Claude and say: *"This is my business. Build me a Notion workspace with tables, relations, and a live dashboard based on this description."*