ACROSS THE TABLE

BUSINESS CONSULTING

INDUSTRY STACK 11 · CLEANING COMPANY

The Cleaning Company Stack

Seven systems for a business whose product is consistency — and whose profit lives in recurring customers.

Knowledge Article I11

AI Stack Series · acrossthetable.biz

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WHO THIS IS FOR

You run a residential or commercial cleaning business. You have cleaners who work unsupervised in other people's buildings, customers who judge you on details, and a schedule that has to survive someone calling in sick at six in the morning.

This guide is for the owner who wants the service to be the same whether or not they are the one doing it. That is the entire management problem in this trade.

It works the same for a two-person team and a thirty-person operation; only the row where you stop changes.

START WITH THE WORK, NOT WITH THE APPS

These are not twenty lists of AI apps. Each stack starts with the jobs a particular business performs, then matches AI and conventional software to those jobs. Treat it as a menu to evaluate, not a shopping list.

For this kind of business the work runs in one line, start to finish:

> **THE PATH THE WORK TAKES**
> Lead → Quote → Schedule → Service → Recurring customer

Broken into the steps a customer actually moves through:

- Lead
- Quote
- Schedule
- Cleaner
- Checklist
- Payment
- Review
- Recurring service

Read that line left to right. Somebody enquires, you quote, you schedule, the clean happens, and the good version is that it repeats on a standing basis.

The thing that kills cleaning businesses is not finding customers. It is losing them quietly — a few missed details, a cleaner swapped without notice, a cancellation nobody followed up on.

THE STACK, PIECE BY PIECE

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Every tool below is matched to one of those steps. You do not need all of them, and you should not buy all of them at once. Read the “What it is” column first and find the step where your business is losing the most time or money.

Tool	The step it covers	What it is	Price
Jobber	Jobs and scheduling	Quotes, scheduling, dispatch, invoicing and payments for home services.	Per month by users.
QuickBooks	Accounting	The small-business accounting standard — books, invoicing, reporting.	Per month by plan.
Square / Stripe	Payments	Card payments, POS hardware and simple business tools.	Percentage per transaction.
HubSpot	CRM	Customer records, marketing, sales and service in one platform.	Free CRM; paid hubs per month.
ChatGPT / Claude	SOPs and training	OpenAI’s general assistant — writing, analysis, research and, with Agent mode, multi-step work.	Free tier; paid plans per user/month.
Canva	Marketing	Design everything else — decks, social posts, flyers, simple video — with AI help built in.	Free tier; Pro per user/month.
Zapier	Automation	Connects thousands of apps and AI models with no code.	Free tier; paid by task volume.

Where two names share a row with a slash between them, they do the same job and you pick one, not both. The description shows the first of the two.

The first three rows run the business. The CRM and automation rows matter once you have more enquiries and more recurring customers than one person can hold in their head.

What to watch out for in each one

None of these are reasons not to buy. They are the things owners tell us they wish they had known first.

- Jobber — Per-user pricing limits big crews on low tiers.
- QuickBooks — Only as clean as your categorization habits.

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- Square — Per-transaction fees. Watch chargebacks.
- Stripe — Per-transaction fees. Watch disputes.
- HubSpot — Costs step up sharply by tier and contact count.
- ChatGPT — It sounds confident when it’s wrong. Check anything that touches money, law or a customer.
- Claude — Same rule as any assistant: verify facts and never paste data you wouldn’t email.
- Canva — Easy to drift off-brand. Lock a brand kit.
- Zapier — Task-based pricing climbs fast once it works.

WHERE AI ACTUALLY FITS IN THIS BUSINESS

Cleaning checklists, onboarding, quality-control workflows, follow-up, quote communication, customer segmentation.

In plain terms, that means:

- Writing the room-by-room checklist for each type of clean, so the work is defined rather than assumed.
- Building the training material for new cleaners from the checklist, so everyone is taught the same way.
- Drafting the quality-control follow-up after a first clean, which is the moment a customer decides whether to stay.
- Writing the quote explanation that makes clear what is and is not included, which prevents most disputes.
- Grouping customers by frequency and value so you know which ones to protect.

The checklist is the product in this business. AI makes writing one fast; it cannot make your cleaners follow it. That part is hiring, training and spot checks.

WHAT TO SET UP FIRST

Do these in order. Finish one before you start the next. Most owners who try to do all of it in one month end up using none of it.

1. **Put the schedule in one system** Jobs, cleaners and recurring visits on one calendar. The morning a cleaner calls in sick is the morning you find out whether your schedule is a system or a memory.
2. **Write the checklists** One per service type. This is the single highest-value hour you will spend on the business, because it turns your standard into something transferable.
3. **Take payment automatically on recurring work** Recurring service with manual invoicing is just irregular service with extra admin.

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4. **Connect to accounting** One entry, not two.
5. **Then add follow-up and marketing** Quality-control messages after first cleans, and campaigns for the services customers do not know you offer.

WHAT IT COSTS TO START

Scheduling software is per user per month. In cleaning the question is whether every cleaner needs a login or only supervisors — that decision can halve or double the bill, so ask before you buy.

Payments are a percentage of each transaction. On recurring residential work the convenience of automatic card payment usually outweighs the fee, because the alternative is chasing.

The real economics here are retention and no-shows, not licences. A system that keeps one recurring customer who would otherwise have drifted pays for itself for the year.

The price column in the table above tells you how each one charges — per user, per location, per contact, or a percentage of every sale — not what you will pay. That is deliberate. The charging model is what decides whether a tool stays affordable as you grow, and it is the part that does not change every quarter. Get the current dollar figure from the vendor’s own pricing page before you budget.

THE RULES UNDERNEATH ALL OF IT

Legal · Privacy · Data protection · Security · Compliance · Records · Audit · Risk · Human oversight — underneath every one of the twenty stacks, not an afterthought.

Your cleaners hold keys and codes to other people’s homes and offices. How those are stored, who has them and what happens when someone leaves is the most important policy in your business. Do not keep them in a group chat.

Background checks and insurance certificates are records customers may ask to see. Keep them current and findable.

Cleaner hours are employment records. Know your state rules on travel time between jobs, which is a common and expensive mistake in this trade.

Photos taken inside a customer’s home require permission before they go anywhere near marketing.

MISTAKES THAT COST THE MOST

- Keeping the standard in the owner’s head, so quality drops the moment they stop cleaning.
- Storing keys and door codes in a text thread.

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- Letting recurring customers lapse without anyone noticing.
- Quoting by the hour without knowing how long your own crews actually take.
- Paying for a login for every cleaner when only supervisors need one.

THE CEO DECISION

- Is your standard written down, or demonstrated?
- What is your recurring customer retention over twelve months?
- Where are keys and access codes stored, and who can see them?
- Does recurring work bill itself?
- When a customer cancels, does anyone find out why?

YOUR QUICK REVIEW

- ☐ Every service type has a written checklist.
- ☐ All jobs and cleaners sit on one shared schedule.
- ☐ Recurring work charges automatically.
- ☐ Keys and access codes are stored in a controlled system.
- ☐ Someone follows up after every first clean.

ADDITIONAL RESOURCES

Tool	Where to find it	What it is for
Jobber	getjobber.com	Contractors, cleaners and landscapers running crews.
QuickBooks	quickbooks.intuit.com	Clean books your accountant already knows how to read.
Square / Stripe	squareup.com / stripe.com	Selling in person without a merchant-account project.
HubSpot	www.hubspot.com	Small businesses that want one system of record.
ChatGPT / Claude	chatgpt.com / claude.ai	Your default thinking partner when you want one tool that does most jobs well.
Canva	www.canva.com	Small teams with no designer who still need consistent-looking work.

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Tool	Where to find it	What it is for
Zapier	zapier.com	Your first automations, and the widest app coverage.
Across the Table AI Assessment	acrossthetable.biz/#assessment	Fifteen minutes. Tells you which job to start with before you buy anything.
The Scaling Edge	acrossthetablebiz.substack.com	Weekly newsletter for owners without a business background.

Go deeper on the pieces

Each of these is a full guide comparing the three tools that do that job:

- Ask and reason — acrossthetable.biz/knowledge-articles/ask-and-reason/ (covers ChatGPT, Claude)
- Make the deck — acrossthetable.biz/knowledge-articles/make-the-deck/ (covers Canva)
- Connect the tools — acrossthetable.biz/knowledge-articles/connect-the-tools/ (covers Zapier)
- Fill the pipeline — acrossthetable.biz/knowledge-articles/fill-the-pipeline/ (covers HubSpot)
- Manage the money — acrossthetable.biz/knowledge-articles/manage-the-money/ (covers QuickBooks)

CONTINUE LEARNING

The Across the Table AI Assessment takes fifteen minutes and starts from the work the business performs.

The guides above compare the tools for each individual job.

READ AND CONNECT WITH ACROSS THE TABLE

Across the Table website: https://acrossthetable.biz

The Scaling Edge newsletter: https://acrossthetablebiz.substack.com

YouTube: https://www.youtube.com/@AcrossTheTableConnie

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