Recommendation Report: Optimizing Operations at TexHaul Rentals LLC.

Eric C. Rose

San Antonio College

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Professor Davis

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Introduction

The purpose of this report is to evaluate different approaches to improving operational efficiency at TexHaul Rentals LLC and recommend the most effective solution. TexHaul Rentals is a service-based business focused on dump trailer rentals and haul-off services. As the business has grown, many daily operations, such as scheduling, invoicing, customer communication, and job tracking have required significant time and attention.

In the initial proposal, a fully custom Python-based automation system was introduced as a solution to eliminate manual processes and improve efficiency. While that approach offers strong long-term potential, further analysis and real-world experience have shown that multiple solutions exist. These include maintaining the current system, adopting off-the-shelf business software, or building a fully custom automation system.

This report evaluates these options based on cost, efficiency, scalability, ease of implementation, and overall practicality. While automation is important, the goal is not to overcomplicate a business that is fundamentally simple: renting trailers and completing haul-off services. Instead, the focus is on maximizing efficiency while maintaining profitability and control.

Methods

The options evaluated in this report were identified through prior research from the initial proposal, combined with real-world operational experience running TexHaul Rentals. The proposal originally emphasized automation as a primary solution, supported by research showing that automation systems can improve efficiency and reduce workload (Emmet, 2023; Melo et al., 2024). Compared to the original proposal, which recommended full automation, this report

expands the analysis by evaluating alternative solutions and adjusting the recommendation based on practicality. Additional consideration was given to industry-standard tools commonly used in service-based businesses, such as Square and Jobber, which offer built-in automation features for scheduling, invoicing, and customer management.

Evaluation Criteria

The following criteria were used to evaluate each option:

- **Cost** – Initial investment and ongoing expenses
- **Ease of Implementation** – Setup time and complexity
- **Scalability** – Ability to support future growth
- **Efficiency Improvement** – Reduction in manual workload
- **Practicality** – Alignment with the actual needs of the business

Option 1: Current Square-Based Automated Workflow

TexHaul Rentals currently operates using a structured system built around Square that already incorporates a significant level of automation. When a customer calls, their information is collected and an appointment is scheduled through Square. Based on the type of service, the appropriate contract is automatically sent to the customer, allowing them to complete required documentation immediately. Invoices are only created after a signed agreement is received, which ensures commitment before time is invested. Additionally, invoice templates are set up to automatically populate service specific details such as pricing, policies, and instructions. This reduces repetitive work and ensures consistency.

Platforms like Square provide built-in tools such as online booking, automated reminders, and integrated payment systems, which help streamline service-based business operations (Square, n.d.). Supporting systems are also in place, including organized Google Drive folders for customer documentation, pre- and post-inspection photos, and liability tracking. Excel based tools are used to process exported invoice data and automate additional workflows. This system has been refined over time and has proven effective in maintaining efficiency while supporting daily operations. It has minimal ongoing cost and aligns directly with how the business actually runs. The main limitation of this approach is that some manual steps still exist, particularly in data handling and system coordination. However, these steps are manageable and do not significantly impact performance.

Option 2: Off-the-Shelf Business Management Software

This option involves using full-service platforms such as Jobber or similar subscription-based tools that handle scheduling, invoicing, and customer management. Software like Jobber is designed to centralize operations into a single system, making it easier to manage appointments, customers, and payments in one place (Jobber, n.d.). The primary advantage of these systems is ease of use and quick setup. However, these platforms come with recurring monthly costs that reduce overall profit margins. For a small service-based business, these costs can add up quickly over time.

Additionally, these platforms are built for general use and may not fully align with TexHaul Rentals' specific workflow. This can lead to inefficiencies, limitations in customization, and reliance on features that are not necessary for the business. While these systems offer

convenience, they do not provide enough additional value to justify the cost, especially when a working system is already in place.

Option 3: Fully Custom Python-Based Automation System

This option involves building a fully customized automation system using Python to handle all business operations, including scheduling, invoicing, customer management, and backend data processing. As discussed in the initial proposal, automation systems have been shown to improve efficiency, reduce administrative workload, and support better decision-making (Emmet, 2023; Melo et al., 2024). A custom system could eventually support advanced features such as remote operations, automated workflows, and a more “faceless” customer experience. This is especially relevant as the business prepares to operate remotely while expanding into new markets such as College Station or Houston. This reflects the original goal of creating a more automated and scalable system outlined in the proposal.

However, this option requires significant development time, technical effort, and ongoing maintenance. It would also involve rebuilding systems that are already functioning effectively, which may not be the most efficient use of time and resources at this stage. While Python based automation is a powerful tool and may play a role in future growth, implementing a full system now would add unnecessary complexity to a business that operates on relatively straightforward services.

Comparison of Options

Each option offers different advantages. Off-the-shelf software provides simplicity but introduces ongoing costs and limitations. A fully custom Python system offers maximum control but requires significant investment and complexity.

The current Square-based system provides a strong balance of efficiency, cost control, and practicality. It already automates key processes and has been proven to work in real-world operations. Unlike the other options, it does not require a complete system overhaul or introduce unnecessary expenses.

Conclusion & Recommendation

Based on the analysis, the most effective solution is to continue using and refining the current Square-based automated workflow while selectively incorporating additional automation where it is beneficial. The existing system already demonstrates strong efficiency through automated scheduling, contract management, and invoicing. Rather than replacing it, the focus should be on improving specific areas, such as data handling and backend processes, potentially using tools like Python to enhance functionality over time.

While a fully custom automation system remains a viable long-term option, especially for supporting remote operations, it is not necessary at this stage. Similarly, off-the-shelf software solutions introduce costs that do not align with the goal of maximizing profitability. By building on what is already working and making targeted improvements, TexHaul Rentals can continue to scale efficiently without overcomplicating operations. This approach provides the best balance between performance, cost, and long-term growth. This conclusion reflects a shift from the original proposal, which focused on full automation, to a more practical and scalable approach.

References

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