

SAMPLE · LANDSCAPING AND FIELD SERVICES

First Business Analysis

Landscaping Business

Prepared for the owner of Landscaping Business. Prepared by Sannidhi, Santa Cruz, California. October 2026.

This is a sample. Landscaping Business is a fictional company and every figure in this document is invented. The format, the depth and the method are what a real client receives.

CONTENTS

- 01 The short version
- 02 What you asked for
- 03 What we looked at
- 04 The shape of your business
- 05 Where the money comes from and where it goes
- 06 Who stays and who drifted
- 07 How new customers find you
- 08 How fast you answer
- 09 What customers say
- 10 How your week runs
- 11 Your software and your records
- 12 What breaks if you are away for a month
- 13 What AI is worth using here
- 14 The options, the three fixes and the scorecard

Three years of your own records, read in full: 9 programs, 61,400 visits, 486 estimates, 4,870 phone calls and every invoice since October 2023.

Two labels run through this document. **From your data** means the figure was counted from your own records. **Our estimate** means it is a projection, and the assumption behind it is stated beside it so you can disagree with it.

01

The short version

Landscaping Business is a sound business that is losing money in three places it cannot currently see.

WHAT IS WORKING

- Revenue has grown each year, to \$3,420,000 in the last twelve months. FROM YOUR DATA
- Customers who stay, stay a long time. The median maintenance customer has been with you 4.2 years. FROM YOUR DATA
- Enhancement work earns a 52% gross margin, the highest of your four lines of work. FROM YOUR DATA

WHERE YOU ARE LOSING MONEY

- **People who try to hire you and never hear back.** 96 calls from new numbers were missed and never returned, and 31 website inquiries were never answered. 112 estimates were sent and never marked won or lost. FROM YOUR DATA
- **Work that was done and not billed.** 19 completed jobs worth \$31,200 were never invoiced. 17 install jobs carried extra work with no change order. 9 maintenance contracts lose money at the hours your crews spend on them. FROM YOUR DATA
- **Hours paid that produce nothing.** One field hour in four is not billable. Your office re-enters invoices and timesheets by hand for about 12 hours a week. FROM YOUR DATA

THE THREE THINGS TO FIX, IN ORDER

1. Answer every inquiry and follow up every estimate. What it is costing you: about \$68,000 a year. OUR ESTIMATE
2. Bill everything you do, and reprice the contracts that have fallen behind. About \$49,000 a year, plus \$31,200 once. OUR ESTIMATE
3. Make LMN the one place your records are kept, so nothing is typed twice. About \$45,000 a year. OUR ESTIMATE

The one number to improve first: the share of estimates that reach a yes or a no. Today it is 77%.

These figures are what each problem is costing you. They are not a promise of what will be recovered.

02

What you asked for

On our first call, you were asked: if you could wave a wand and have one thing in your business handled automatically, perfectly, every time, what would it be?

Your answer, word for word:

"Every estimate goes out the same day I walk the property, and somebody follows up on it until we get an answer. Without me being the one who remembers."

The records agree with you. Estimates take a median of 9 days to go out, and 84 of them received no follow up at all. Fix 1 is built around your answer.

What we looked at

SOFTWARE	WHAT WAS READ	PERIOD
LMN	1,812 client records, 61,400 visits, 486 estimates, 219 maintenance contracts, budgets against actual hours	October 2023 to September 2026
QuickBooks Online	Every invoice, payment, bill and the general ledger	October 2023 to September 2026
Gusto	Hours, pay and overtime for all 31 people	October 2023 to September 2026
Quo phone system	4,870 inbound calls and 6,200 texts	October 2025 to September 2026
Truck GPS	Drive time and stops for 8 crews	October 2025 to September 2026
Google Business Profile	Views, calls, direction requests, reviews	April 2025 to September 2026
Google Ads	Spend, search terms, clicks	October 2025 to September 2026
Website form and Gmail	412 inquiries and the replies to them	October 2025 to September 2026
Two shared spreadsheets	The Crew Board and the irrigation inspection log	Current versions

What was missing. Google Ads has no call tracking, so 38% of ad leads cannot be tied to a customer. Nobody records why a customer cancels. Phone history before October 2025 is not held.

Confidence. High on money, contracts, estimates and crew hours. Medium on marketing, because of the tracking gap. The value of missed inquiries is an estimate and is labeled as one.

The shape of your business

Four lines of work make up the year. FROM YOUR DATA

LINE OF WORK	REVENUE, LAST 12 MONTHS	SHARE	GROSS MARGIN
Maintenance contracts	\$1,915,000	56%	38%
Enhancements for contract customers	\$718,000	21%	52%
Design and install projects	\$547,000	16%	29%
Irrigation service and repair	\$240,000	7%	47%
Total	\$3,420,000		40%

Growth is slowing. Revenue rose 7.9% two years ago and 4.0% in the last twelve months. FROM YOUR DATA

Ten customers are 31% of your revenue. The largest, one homeowner association management firm with nine properties, is 11.4% alone, or \$390,000 a year. FROM YOUR DATA That firm's contracts all renew in the same month.

Winter costs more than it earns. December to February brings in 14% of the year's revenue and carries 21% of the year's payroll. FROM YOUR DATA

This is why everything below comes in this order. The business does not need more customers first. It needs to keep, bill and serve the ones it has.

05

Where the money comes from and where it goes

You kept 6.9 cents of every dollar. Operating profit was \$236,000 on \$3,420,000, after your own salary.

FROM YOUR DATA

WHERE EACH DOLLAR WENT	SHARE OF REVENUE
Labor, field and office	46%
Materials and plants	19%
Equipment, fuel and repairs	9%
Overhead, insurance, software, rent	19%
Operating profit	7%

Work done and never invoiced: \$31,200. Sannidhi matched every completed visit in LMN against every invoice in QuickBooks. 19 completed jobs have no invoice. Most are enhancements finished in the spring rush. FROM YOUR DATA

Extra work with no change order: about \$14,500. On 17 install jobs, crew notes describe added work that never reached the invoice. *Our estimate, from the hours and materials logged against those notes.*

9 maintenance contracts lose money. LMN holds the hours each contract was budgeted for and the hours your crews spent. On these 9, the difference costs \$18,400 a year more than the contracts bring in. Another 23 run below a 25% margin. FROM YOUR DATA

38 contracts have had no price increase in three years. Over the same period your average crew wage rose 17%. A 5% increase on those contracts is worth \$15,900 a year. OUR ESTIMATE

You wait 44 days to be paid. Enhancement jobs take a median of 11 days to invoice after the work is done, and installs take 16. \$412,000 is owed to you today. \$131,000 of it is more than 60 days old, and \$58,000 of that is owed by two associations. FROM YOUR DATA

Software costs \$35,520 a year across 14 tools. Three of them do the same job as a tool you already pay for, at \$410 a month. FROM YOUR DATA

06

Who stays and who drifted

You lost 24 contracts in the last twelve months, up from 16 the year before. That is 11.0% of contracts, against 7.5%. The 24 were worth \$196,000 a year. FROM YOUR DATA

15 of the 24 cancelled within 60 days of a crew lead change. No other pattern in the records comes close. Price increases, complaints and season do not explain the cancellations. A new face on the property does. FROM YOUR DATA

Customers who buy an enhancement stay. Contract customers who bought any enhancement in the last three years cancelled at 4%. Those who bought none cancelled at 16%. FROM YOUR DATA

More than half your contract customers bought nothing extra. 96 of 212 bought an enhancement last year, spending \$7,479 on average. The other 116 were never sent a proposal. FROM YOUR DATA

One time customers rarely come back. Of 126 project and repair customers last year, 9 became contract customers. Nobody asked the other 117. FROM YOUR DATA

07

How new customers find you

143 new customers arrived in the last twelve months. FROM YOUR DATA

SOURCE	NEW CUSTOMERS	AVERAGE FIRST YEAR REVENUE
Referral from a customer	58	\$9,100
Google search and your Google profile	34	\$6,200
Google Ads	19	\$3,895
Association and property manager relationships	14	\$31,400
Saw a truck or a job site	8	\$5,300
Unknown	10	\$4,100

Google Ads cost \$2,179 for each new customer, and those customers spent \$3,895. You spent \$41,400 and gained 19 customers. FROM YOUR DATA

44% of the ad money went to searches you do not want. \$18,200 was spent on terms such as "lawn mowing near me." The business turns down mow only residential work. FROM YOUR DATA

Your best source costs nothing and has no process. Referrals bring the most customers and nearly the highest value. Nothing in any program asks for one.

Your Google profile is seen 3,400 times a month. In 18 months it produced 1,940 call clicks and 2,310 website clicks. FROM YOUR DATA The profile is right. Bing shows the wrong hours, Apple Maps shows your old yard address, and the Yelp page is unclaimed.

What cannot be measured yet. Without call tracking, an ad lead that phones in cannot be tied to a job. Fixing that is part of Fix 1.

08

How fast you answer

One call in five is missed. 1,023 of 4,870 inbound calls went unanswered. From March to May the share rose to 34%. FROM YOUR DATA

96 new callers never heard from you. Most missed calls came from existing customers who reached you later. 214 came from numbers that are not in your customer list, and 96 of those were never called or texted back. FROM YOUR DATA

Website inquiries wait 26 hours. That is the median time to a first reply. 31 of 412 inquiries were never answered. FROM YOUR DATA

Estimates take 9 days to send. FROM YOUR DATA

DAYS FROM SITE VISIT TO ESTIMATE SENT	ESTIMATES WON
3 days or fewer	54%
4 to 9 days	39%
10 days or more	24%

112 estimates have no outcome. You sent 486 estimates worth \$2,870,000. 187 were won and 187 were lost. The other 112, worth \$418,000, were never marked either way, and 84 of them show no contact after the day they were sent. FROM YOUR DATA

What this is worth. In your own records, 46% of new inquiries reach an estimate, 38.5% of estimates are won, and the average won job is \$6,364. So each new inquiry is worth about \$1,127. If a third of the 127 unanswered inquiries were real prospects, that is \$47,300 a year. OUR ESTIMATE

09

What customers say

87 Google reviews, average 4.6. Only 9 arrived in the last twelve months, against roughly 2,900 completed jobs. FROM YOUR DATA

23 reviews have no reply, including four of your six reviews below three stars.

What people praise: crews that show up when promised, and the same crew lead year after year. **What people complain about:** not hearing back on a quote, and irrigation that needed a second visit. Both complaints match the records in parts 8 and 10.

10

How your week runs

One field hour in four is not billable. You paid for 52,300 field hours. 38,900 were billed to a customer. FROM YOUR DATA

WHERE THE OTHER 13,400 HOURS WENT	HOURS
Driving	6,100
Loading and yard time	3,900
Return visits to redo work	1,250
Not assigned to anything	2,150

Some of this is the cost of doing field work. Driving and loading will never be zero.

Two crews drive nearly twice as much as your best crew. Crews 3 and 5 average 71 minutes of driving a day. Crew 1 averages 38. On Tuesdays, crews 3 and 5 cross each other's routes. FROM YOUR DATA Rebalancing those two routes is worth about 900 hours a year, or \$27,900. *Our estimate, at a full cost of \$31 an hour.*

Overtime cost \$48,900 in premium pay. 71% of it fell in April, May and June. FROM YOUR DATA

Return visits: 214 in the year. 46% were irrigation problems after an install. FROM YOUR DATA

Each field hour you pay for brings in \$65. That is the number to watch as routes and billing improve. FROM YOUR DATA

Your own hours. You estimated 22 hours a week on office work, 9 of them writing estimates. *Your estimate.*

11

Your software and your records

THE TOOLS ARE GOOD. THE CONNECTIONS BETWEEN THEM ARE MISSING.

TOOL	WHAT IT DOES FOR YOU	VERDICT
LMN	Clients, estimates, budgets, schedule, crew time, job costing, invoices	Keep. Make it the one place your records are kept.
QuickBooks Online	The books	Keep. Reconnect it to LMN.
Gusto	Payroll	Keep. Feed it hours from LMN.
Quo	Phones and texts	Keep. Add a text back on missed calls.
The Crew Board spreadsheet	Who goes where each day	Replace with LMN's schedule.
Paper timesheets	Crew hours for five of your eight crews	Replace with the LMN Crew app. Three crews already use it.
Irrigation inspection spreadsheet	Controller settings and inspection dates	Move into LMN client records.
Mailchimp	Two newsletters a year	Keep, and use it for the spring enhancement mailing.
Three overlapping tools	Photo storage, forms, a second scheduling tool	Cancel. \$410 a month.

The link between LMN and QuickBooks was switched off in 2024. It was creating duplicate customers. Since then your office manager has re-entered invoices by hand, about 7 hours a week. Paper timesheets take another 5. *From your data and your office manager's estimate.*

The two programs no longer agree. LMN holds 1,812 clients and QuickBooks holds 2,140. 286 are duplicates. This is how 19 finished jobs went unbilled: nothing compares the two. FROM YOUR DATA

Record gaps. 94 clients have no email address, so they cannot be sent an estimate reminder or a review request. 47 contracts have no renewal date recorded.

Access. 9 people who no longer work for you still have a working login to at least one program.

FROM YOUR DATA This is something for you to act on this week.

What only one person knows. The daily crew plan lives with your operations manager. Every irrigation controller setting lives with one technician.

12

What breaks if you are away for a month

- **Estimates stop.** You write almost all of them.
- **The crew plan depends on one person** and one spreadsheet.
- **One customer is 11.4% of revenue**, and its nine contracts renew together in March.
- **One technician holds the irrigation knowledge.**
- **One person holds the applicator license** your spray work depends on.
- **Two associations owe \$58,000** that is more than 90 days old, and nobody is assigned to chase it.

None of these is a crisis today. Each one could become a crisis with a single event.

13

What AI is worth using here

WORTH DOING NOW

- **A text back within a minute to every missed call**, and a same day reply to every website inquiry, written in your voice and approved by you once.
- **Estimate follow up** at 2, 7 and 14 days, until each estimate is marked won or lost.
- **A weekly check of finished work against invoices**, so nothing completed goes unbilled.
- **A review request** after each completed enhancement or install.
- **A spring enhancement proposal** for the 116 contract customers who were never sent one, drafted from each property's own history.

NOT WORTH DOING YET

- **Pricing estimates from photos.** Your margins on installs are too thin to trust a price nobody walked.
- **Buying a separate route planning product.** Your routes can be fixed from the GPS data you already have. Revisit it after the Crew Board is in LMN.
- **Replacing LMN with a larger software package.** Nothing in this analysis is caused by LMN. Switching would cost a season of disruption and fix none of it.

- **An automated phone answering voice.** Your customers praise talking to a person. A text back keeps that.

14

The options, the three fixes and the scorecard

Option A: do nothing. The business stays profitable. The losses in this document continue at roughly their current size, and contract cancellations are rising.

Option B: fix it yourselves. Everything here can be done by your own office with this document as the plan. The limit is time: the 12 hours a week your office spends re-entering data are the hours this would need.

Option C: Sannidhi does it. The three fixes below, in order.

FIX	WHAT GETS DONE	WHAT IT IS COSTING YOU	COST
1. Answer and follow up	Text back on missed calls. Same day replies. Estimate follow up. Every estimate marked won or lost. Call tracking on ads, and the unwanted search terms removed.	About \$68,000 a year. OUR ESTIMATE	Included
2. Bill what you do	Weekly match of finished work to invoices. Change orders raised from crew notes. Invoices out within 2 days. 38 contracts repriced and 9 losing contracts corrected, each with your approval.	About \$49,000 a year, plus \$31,200 once. OUR ESTIMATE	Included
3. One record	LMN and QuickBooks reconnected, duplicates cleaned first. All eight crews on the LMN Crew app. The Crew Board moved into LMN. Routes for crews 3 and 5 rebalanced. Old logins removed.	About \$45,000 a year. OUR ESTIMATE	Included

Together the three problems are costing you about \$162,000 a year, a little under 5% of revenue.

EVERY COST, STATED PLAINLY

- Sannidhi: \$500 a month.
- New software: none. Three tools are cancelled, which saves \$410 a month.
- Your time: one hour a week to read the Monday report and make the decisions it asks for.

How the estimates were built. Fix 1 is \$47,300 from unanswered inquiries plus 5% of the \$418,000 in open estimates. Fix 2 is \$14,500 in change orders, \$15,900 in repricing and \$18,400 from the losing contracts. Fix 3 is 12 office hours a week at \$28 an hour plus the \$27,900 in route time.

What comes first. Fix 1 starts in the first week, because it is what you asked for. Fix 2 starts with the 19 unbilled jobs, since that money is already earned.

Your scorecard

These are your main numbers as of 30 September 2026. The same ten are measured again every quarter, and your Monday report tracks them in between.

MAIN NUMBER	TODAY	WHERE IT COMES FROM
Revenue, last 12 months	\$3,420,000	QuickBooks
Maintenance contracts	212	LMN
Contracts cancelled, last 12 months	11.0%	LMN
Estimates that reached a yes or a no	77%	LMN
Days from site visit to estimate sent	9	LMN
New inquiries with no reply	127 a year	Quo, website form
Finished work not yet invoiced	\$31,200	LMN and QuickBooks
Field hours that were billed	74%	Gusto and LMN
Days to be paid	44	QuickBooks
Your hours a week on office work	22	Your estimate

What we could not tell from your records

- **Why customers cancel.** Nobody records a reason. A one line reason field on every cancellation fixes this from now on.
- **Which ad leads became jobs.** Call tracking closes this gap.
- **True profit on each install.** Materials are billed to the job in QuickBooks only some of the time.
- **How long your own estimates take to write.** We have your estimate of 9 hours a week and nothing to check it against.



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