

SAMPLE · LANDSCAPING AND FIELD SERVICES

Quarterly Business Analysis

Landscaping Business

Prepared for the owner of Landscaping Business. Your main numbers as of 31 March 2027. This is your second quarterly analysis. We run a new one every three months.
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This is a sample. Landscaping Business is a fictional company and every figure in this document is invented. The format is what a real client receives every quarter.

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From your data means counted from your own records. **Our estimate** means a projection, with its assumption stated.

01

The short version

Eight of your ten main numbers are working, one is on watch, and one needs adjusting.

WHAT IS WORKING

- **Nobody who contacts you goes unanswered.** Inquiries with no reply went from 32 a quarter to none. FROM YOUR DATA
- **Estimates go out in 3 days, down from 9,** and you are winning 44% of them, up from 38.5%. FROM YOUR DATA
- **Everything finished is billed.** Unbilled work went from \$31,200 to nothing at the end of the quarter. FROM YOUR DATA
- **You are paid in 38 days, down from 44.** This is the number that needed adjusting last quarter. FROM YOUR DATA
- **Fewer customers are leaving.** Cancellations fell from 11.0% to 8.6% of contracts. FROM YOUR DATA

WHAT NEEDS ADJUSTING

- **Your own hours went back up, from 17 to 19 a week.** Estimates are no longer what slows you down. Site visits are. In March a new inquiry waited 11 days for you to walk the property, up from 5 in September. *From your data and your estimate.*

THE THREE THINGS TO FIX NEXT QUARTER

1. Take the smaller site visits off your calendar.
2. Ask for referrals, your best source of customers, every time a job is finished.
3. Plan April to June crew hours now, before overtime starts.

Your scorecard

MAIN NUMBER	30 SEPTEMBER 2026	31 DECEMBER 2026	31 MARCH 2027	READING
Revenue, last 12 months	\$3,420,000	\$3,451,000	\$3,538,000	WORKING
Maintenance contracts	212	213	221	WORKING
Contracts cancelled, last 12 months	11.0%	10.5%	8.6%	WORKING
Estimates that reached a yes or a no	77%	93%	96%	WORKING
Days from site visit to estimate sent	9	4	3	WORKING
New inquiries with no reply, in the quarter	32	1	0	WORKING
Finished work not yet invoiced	\$31,200	\$2,100	\$0	WORKING
Field hours that were billed, January to March	66% a year earlier		70%	WATCH
Days to be paid	44	46	38	WORKING , after an adjustment
Your hours a week on office work	22	17	19	ADJUST

Revenue is read as working with a caution. It is up 3.5% in six months, and part of that is ordinary spring growth.

Billed field hours are compared with the same winter months a year earlier, because winter cannot be judged against the full year. The gain is real. It stays on watch until the busy season tests it.

What worked, and why we think so

Answering. Every missed call now gets a text within a minute, and every website inquiry gets a reply the same day. In March you missed 31% of calls, which is normal for the start of your season. 7 callers who were reached by text became customers, worth \$29,400. FROM YOUR DATA

Follow up. Each estimate is followed up at 2, 7 and 14 days until it is marked won or lost. 6 of the old estimates that had gone quiet were won after a follow up, worth \$24,600. FROM YOUR DATA

Billing. Finished work is matched to invoices every week. The 19 unbilled jobs were invoiced for \$31,200, and \$29,100 of it has been collected. Change orders worth \$6,300 were raised from crew notes. FROM YOUR DATA

Prices. The 5% increase went to 38 contracts on 1 January. 37 accepted it and 1 cancelled. FROM YOUR DATA

Losing contracts. Of the 9 that lost money, 4 were repriced, 3 had their scope reduced, and 2 customers chose to leave. Those two were paying \$21,000 a year and costing you more than that. FROM YOUR DATA

Crew lead changes. A new crew lead now visits each property with the outgoing lead and the customer gets a short note beforehand. There have been 4 lead changes since. None was followed by a cancellation. Four is a small number, so we will keep watching it. FROM YOUR DATA

Enhancement proposals. In February a proposal went to each of the 116 contract customers who had never been sent one. 14 accepted, worth \$58,800. FROM YOUR DATA

One record. LMN and QuickBooks were reconnected in January after the 286 duplicates were merged. All 8 crews record their hours in the LMN Crew app. Your office now spends about 3 hours a week re-entering data, down from 12. *From your data and your office manager's estimate.*

Routes. Crews 3 and 5 were rebalanced in February. Their daily drive time fell from 71 minutes to 49.

FROM YOUR DATA

Money the records link to this work, in six months: \$154,200. That is \$31,200 in recovered billing, \$6,300 in change orders, \$3,900 from the price increase so far, \$24,600 from followed up estimates, \$29,400 from callers reached by text, and \$58,800 in enhancement proposals. You have paid Sannidhi \$3,000 in that time. The records show each sale followed one of these actions. They cannot prove that none of them would have happened anyway.

04

What we adjusted last quarter, and what happened

In December, days to be paid had risen from 44 to 46. Reminders were not getting your two slowest customers to pay.

We changed two things. Your office manager now calls any account over 45 days, using a list we send each Monday. New commercial contracts carry payment terms of 30 days with a stated late fee.

One association paid \$41,000 in February. The other is on a payment plan. Money owed for more than 60 days fell from \$131,000 to \$62,000, and days to be paid is now 38. FROM YOUR DATA

05

What needs adjusting now

Site visits are now what slows things down. Faster answers and faster estimates brought more people to the next step, and that step is you. In March there were 64 site visits to make. You made all of them. The wait from inquiry to site visit grew from 5 days to 11. FROM YOUR DATA

Estimates sent within 3 days of an inquiry win far more often than slow ones, so this wait will cost you spring work if it stays.

The decision for you. 41 of the 64 March visits were for enhancement work under \$5,000 at properties you already maintain. Your account manager could make those visits with a checklist and photos, and you would approve each estimate before it goes out. That would return about 6 hours a week to you.

OUR ESTIMATE It is your call, and the checklist is drafted for you to read.

06

Supporting numbers that moved

NUMBER	30 SEPTEMBER 2026	31 MARCH 2027
Share of estimates won	38.5%	44%
Estimates with no outcome	112	9
Money owed for more than 60 days	\$131,000	\$62,000
Maintenance contracts that lose money	9	0
Contract customers who bought an enhancement	45%	51%
Cancellations with a recorded reason	None	6 of 6 this quarter
Cost per new customer from Google Ads	\$2,179	\$1,640
Share of ad spend on unwanted searches	44%	5%
New Google reviews	9 in a year	14 in six months
Daily drive time, crews 3 and 5	71 minutes	49 minutes
Office hours a week re-entering data	12	3
Duplicate customers across LMN and QuickBooks	286	0
Software cost a year	\$35,520	\$30,600

Why customers left this quarter. Six contracts were cancelled. Two were the losing contracts, one followed the price letter, two sold their property, and one cited service. This is the first quarter the reasons were recorded.

07

Changes to what we measure

- **Added:** days from inquiry to site visit. It was not a problem six months ago and it is the main one now.
- **Retired from the scorecard:** logins held by people who have left. It has been zero since October and is now checked every month without a report.

The list of numbers is expected to change as the business does.

Next quarter

FIX	WHAT GETS DONE	WHAT WE WILL WATCH
1. Site visits	If you approve, your account manager takes enhancement visits under \$5,000 from April.	Days from inquiry to site visit. Your hours a week. Share of estimates won.
2. Referrals	Each finished enhancement and install is followed by a thank you, a review request and a referral ask, in your voice.	New customers from referrals. New reviews.
3. The busy season	Last year 71% of overtime fell in April to June. We plan crew hours for those months from last year's pattern and point out each week that runs over.	Overtime premium paid. Billed field hours.

Cost. Sannidhi: \$500 a month, unchanged. No new software.

Your largest customer. All nine contracts with the association management firm renewed in March, after your January meeting. It is still 11% of revenue. You still depend on that one customer for a large share of your revenue.

What we still cannot tell

- **True profit on each install.** Materials are now billed to the job in LMN for new installs only. A full year of them is needed.
- **Whether the lower cancellation rate will hold.** The spring renewals went well. One good season is not a pattern yet.



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