

SAMPLE · HOME SERVICES AND THE TRADES

The numbers we track

Plumbing and Heating Business

This is a sample. Plumbing and Heating Business is a fictional company and every figure in this document is invented. The figures match the sample Business Analysis.

The first Business Analysis produced 10 main numbers and 48 supporting numbers for Plumbing and Heating Business. All 58 are measured again every three months against the values dated 30 September 2026.

How the list works

- **The owner reads ten.** The main numbers are the scorecard. They appear in the quarterly Business Analysis and the Monday report.
- **We track the other 48.** The supporting numbers explain why a main number moved. They appear in the quarterly analysis only where they matter.
- **Every number has a dated starting value** agreed with the owner at the first readout.
- **No outside benchmarks are used.** There is no "in range" column. Each number is compared with this business's own earlier value and with nothing else. A figure that is normal for the trade can still be a place where this business is losing money, and a figure that looks poor can be the right choice for it.
- **Seasonal numbers are compared with the same quarter a year earlier.** A plumbing and heating company's January cannot be judged against its May. Those numbers are marked "seasonal" below.
- **Each number gets one of three readings every quarter:**
 - **Working:** it moved the right way, and the records show our change is the likely reason.
 - **Watch:** it has not moved, or it is too early to tell.
 - **Adjust:** it moved the wrong way, or the change we made is not producing the effect. The approach changes next quarter.

The ten main numbers

MAIN NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM	FIX
Revenue, last 12 months	\$2,600,000	Higher	QuickBooks	All
Replacement estimates that reached a yes or a no	68%	Higher	Housecall Pro	1
Replacement estimates won (seasonal)	39%	Higher	Housecall Pro	1
New inquiries with no reply	192 a year, or 48 a quarter	Lower	Quo, website form	1
Active memberships	684	Higher	Housecall Pro	2
Memberships lost, last 12 months	34%	Lower	Housecall Pro	2
Finished work not yet invoiced	\$21,300	Lower	Housecall Pro and QuickBooks	2
Callbacks, last 12 months	187	Lower	Housecall Pro	3
Jobs per service truck per day (seasonal)	4.1	Higher	Housecall Pro	3
Owner's hours a week on office work	24	Lower	Owner's own count	1 and 3

Supporting numbers

Answering and estimates

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
Share of inbound calls missed (seasonal)	15%, and 24% in December to February	Lower	Quo
Calls missed in the weekday lunch hour	231 a year	Lower	Quo
New callers never called back	168 a year	Lower	Quo and Housecall Pro
Time to first reply on a website inquiry	19 hours	Lower	Website form and Gmail
Website inquiries never answered	24 a year	Lower	Website form and Gmail
Estimates with no outcome	238, worth \$760,000	Lower	Housecall Pro
Estimates with no contact after the day they were given	196	Lower	Housecall Pro and Quo
Share of estimates won, highest and lowest technician	48% and 23%	Higher, and closer together	Housecall Pro
Days from a technician's report to a furnace or boiler estimate	6	Lower	Housecall Pro
Share won when that estimate goes out by the next day	58%	Higher	Housecall Pro

Billing and cash

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
Service invoices with a part in the notes and none billed	412 a year, about \$26,800	Lower	Housecall Pro
Warranty parts with no claim filed	37 a year, about \$5,400	Lower	Housecall Pro and QuickBooks
Discounts given	\$38,200 a year	Lower	Housecall Pro
Average service ticket	\$400	Higher	Housecall Pro
Average service ticket, highest and lowest technician	\$452 and \$354	Higher, and closer together	Housecall Pro
Days from finished job to invoice, replacements	6	Lower	Housecall Pro and QuickBooks
Days to be paid	17	Lower	QuickBooks
Money owed for more than 60 days	\$41,000	Lower	QuickBooks
Gross margin, all work	47%	Higher	QuickBooks and Gusto
Operating profit	8.0%	Higher	QuickBooks

Members and customers kept

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
New memberships, last 12 months	244	Higher	Housecall Pro
Memberships lost to a failed card, last 12 months	131	Lower	Housecall Pro
Members with no visit in the last 12 months	127 of 684	Lower	Housecall Pro
Memberships sold, highest and lowest technician	96 and 14	Higher, and closer together	Housecall Pro
Replacement estimates won, members and everyone else	61% and 34%	Higher	Housecall Pro
First time customers who came back within 12 months	26%	Higher	Housecall Pro
Water heaters on record that are ten years old or more	412	A list to work, with no better direction	Housecall Pro job notes

Customers found

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
New customers, last 12 months	1,400	Higher	Housecall Pro
Cost per booked job, Local Services Ads	\$110	Lower	Google Local Services Ads and Housecall Pro
Cost per booked job, Google Ads	\$200	Lower	Google Ads and Housecall Pro
Share of Google Ads spend on unwanted searches	37%	Lower	Google Ads
Paid leads never called back	61 a year, about \$4,300	Lower	Google Local Services Ads and Quo
Ad calls that can be tied to a customer	None	Higher	Google Ads, Quo
Google reviews and rating	412 at 4.7	Higher	Google Business Profile
New reviews, last 12 months	38	Higher	Google Business Profile
Reviews with no reply	54	Lower	Google Business Profile

Truck time

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
Callbacks as a share of paid jobs	5.5%	Lower	Housecall Pro
Callbacks, highest and lowest technician	56 and 31	Lower, and closer together	Housecall Pro
Callbacks with a recorded reason	None	Higher	Housecall Pro
Drive time per service truck per day	2.3 hours	Lower	Housecall Pro
Trips to the supply house, last 12 months	1,140	Lower	QuickBooks supplier bills
Overtime premium paid, last 12 months (seasonal)	\$30,000	Lower	Gusto

Records and software

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
Office hours a week copying between programs	9	Lower	Office staff's estimate
Open items held only in the dispatcher's spreadsheet	64	Lower	The spreadsheet
Duplicate customers across Housecall Pro and QuickBooks	410	Lower	Housecall Pro and QuickBooks
Working logins held by people who have left	6	Lower	Every program
Software cost a year	\$21,840	Lower	QuickBooks

The owner's time

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
Owner's hours a week on estimates	8	Lower	Owner's own count

How the first quarterly check would read

This is an invented example of the main numbers at the first quarterly check, dated 31 December 2026. It matches the sample six month Business Analysis.

MAIN NUMBER	30 SEPTEMBER	31 DECEMBER	READING	WHAT IT MEANS
Revenue, last 12 months	\$2,600,000	\$2,648,000	WATCH	One quarter is too short to judge a yearly figure.
Replacement estimates that reached a yes or a no	68%	88%	WORKING	180 of the 204 estimates given this quarter were marked won or lost.
Replacement estimates won	39%	43%	WATCH	88 of 204. Winter estimates always win more often, so this waits for a full comparison.
New inquiries with no reply, in the quarter	48	3	WORKING	Every missed call gets a text back.
Active memberships	684	702	WATCH	The work on failed cards began in December. 9 members were restored.
Memberships lost, last 12 months	34%	32%	WATCH	Too early to tell.
Finished work not yet invoiced	\$21,300	\$1,900	WORKING	The weekly match of finished jobs to invoices caught 5 new jobs.
Callbacks, last 12 months	187	196	ADJUST	58 this quarter against 49 a year earlier. The closing checklist was skipped on most jobs. Next quarter: the owner works alongside technician D, and each callback is reviewed on Monday with the technician who did the first job.
Jobs per service truck per day, October to December	4.3 a year earlier	4.3	WATCH	No change. Sending trucks by area starts in January.
Owner's hours a week on office work	24	20	WORKING	Owner's own count. Furnace estimates are drafted for approval the same day.

The "Adjust" row is the point of the quarterly check. It shows the owner what did not work and what changes because of it.



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