

SAMPLE · HOME SERVICES AND THE TRADES

# Quarterly Business Analysis

## Plumbing and Heating Business

**Prepared for the owner of Plumbing and Heating Business.** Your main numbers as of 31 March 2027. This is your second quarterly analysis. We run a new one every three months. Prepared by Sannidhi, Santa Cruz, California.

This is a sample. Plumbing and Heating 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.

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## The short version

Nine of your ten main numbers are working and one is on watch. A new number, added this quarter, needs adjusting.

### WHAT IS WORKING

- **Nobody who contacts you goes unanswered.** Inquiries with no reply went from 48 a quarter to 1. FROM YOUR DATA
- **Replacement estimates get an answer.** 94% reached a yes or a no this quarter, up from 68%. You won 46%, up from 39%. FROM YOUR DATA
- **Everything finished is billed.** Unbilled work went from \$21,300 to \$600. FROM YOUR DATA
- **The membership plan is growing.** 753 members, up from 684. The share lost in a year fell from 34% to 23%. FROM YOUR DATA
- **Callbacks are down, from 187 a year to 171.** This is the number that needed adjusting last quarter. FROM YOUR DATA

### WHAT NEEDS ADJUSTING

- **Customers who say yes now wait 6 days for the install, up from 2.** You sold 102 replacements this quarter against 80 a year earlier, and the same two install crews did the work. 9 customers cancelled while they waited. FROM YOUR DATA

### THE THREE THINGS TO FIX NEXT QUARTER

1. Shorten the wait for an install.
2. Give every member the visits they are paying for, while the trucks are quiet.
3. Offer a replacement to customers whose water heater is ten years old or more, before it fails.

## Your scorecard

| MAIN NUMBER                                               | 30 SEPTEMBER<br>2026 | 31 DECEMBER<br>2026 | 31 MARCH<br>2027 | READING                       |
|-----------------------------------------------------------|----------------------|---------------------|------------------|-------------------------------|
| Revenue, last 12 months                                   | \$2,600,000          | \$2,648,000         | \$2,741,000      | WORKING , with a caution      |
| Replacement estimates that reached a yes or a no          | 68%                  | 88%                 | 94%              | WORKING                       |
| Replacement estimates won                                 | 39%                  | 43%                 | 46%              | WORKING , with a caution      |
| New inquiries with no reply, in the quarter               | 48                   | 3                   | 1                | WORKING                       |
| Active memberships                                        | 684                  | 702                 | 753              | WORKING                       |
| Memberships lost, last 12 months                          | 34%                  | 32%                 | 23%              | WORKING                       |
| Finished work not yet invoiced                            | \$21,300             | \$1,900             | \$600            | WORKING                       |
| Callbacks, last 12 months                                 | 187                  | 196                 | 171              | WORKING , after an adjustment |
| Jobs per service truck per day, January to March          | 4.4 a year earlier   |                     | 4.6              | WATCH                         |
| Your hours a week on office work                          | 24                   | 20                  | 18               | WORKING                       |
| <b>Added this quarter:</b> days from a yes to the install | 2                    | 3                   | 6                | ADJUST                        |

The two estimate numbers are counted on estimates given in each quarter. The 30 September values cover the twelve months before it.

**A caution on revenue.** It is up 5.4% in six months. Part of that is the winter. Calls for no heat in January were up 22% on the January before, and that would have happened without any of this work.

FROM YOUR DATA

**A caution on estimates won.** Winter estimates always win more often, because a house with no heat cannot wait. The fair comparison is January to March a year earlier, when you won 80 of 196, or 41%. This quarter you won 102 of 221, or 46%. The gain is real and it is 5 points, not 7. FROM YOUR DATA

Jobs per service truck is compared with the same winter months a year earlier. It stays on watch until a slow quarter tests it.

## What worked, and why we think so

**Answering.** Every missed call now gets a text within a minute, and the office staggers lunch. In January you missed 22% of calls, against 26% the January before. 58 callers who were reached by text became customers, worth \$27,600. FROM YOUR DATA

**Follow up.** Each replacement estimate is followed up at 2, 5 and 10 days until it is marked won or lost. 14 of the 238 old estimates that had gone quiet were won after a follow up, worth \$41,200. FROM YOUR DATA

**Your own estimates.** A furnace or boiler estimate is now drafted the same day from the technician's notes and photos, and you approve or change it. The wait from the technician's report to the estimate fell from 6 days to 1. You still visit every boiler job. FROM YOUR DATA

**Billing.** Finished jobs are matched to invoices every week. Of the 46 unbilled jobs, 39 were invoiced for \$18,900 and \$17,400 has been collected. FROM YOUR DATA

**Parts.** Each invoice is checked against the job notes before it closes. Parts worth \$9,800 were added to invoices that would have gone out without them. FROM YOUR DATA

**Warranty claims.** 21 claims were filed with the supply house and \$3,100 has been credited. FROM YOUR DATA

**Members.** A member is now contacted 30 days before a card expires and on the day a payment fails. Of the 131 members lost to a failed card last year, 52 have been restored, and they have paid \$5,100 in fees since. Only 6 members were lost to a failed card this quarter. FROM YOUR DATA

**Overdue visits.** 96 tune up visits were booked for members who had not seen a technician in a year. Those visits led to \$14,300 in repair work. Members with no visit in twelve months went from 127 to 31.

FROM YOUR DATA

**Ads.** Call reporting was turned on in October and the unwanted searches were removed. Spend on unwanted searches fell from 37% to 6%. The cost of a booked job from Google Ads fell from \$200 to \$152.

FROM YOUR DATA

**One record.** The dispatcher's spreadsheet was retired in December. Its 64 open items were moved into Housecall Pro and every one has been closed or booked. Your office now spends about 2 hours a week copying between programs, down from 9. *From your data, and our estimate from what your office told us.*

**Money the records link to this work, in six months: \$118,500.** That is \$17,400 in recovered billing, \$9,800 in parts, \$3,100 in warranty credits, \$5,100 from restored memberships, \$41,200 from followed up estimates, \$27,600 from callers reached by text, and \$14,300 from overdue member visits. 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.

**What the changes cost you.** FROM YOUR DATA

- You chose not to bill 7 of the 46 old jobs, worth \$2,400, because they were more than a year old.
- 3 customers complained about an invoice for work done months earlier. One left a two star review.

- 11 customers asked not to be texted about an estimate again. Follow up now stops at the first no, and each of those was marked lost.
  - Checking parts against notes adds about 4 minutes to closing each service call. *Our estimate, from what the technicians told us.*
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## What we adjusted last quarter, and what happened

In December, callbacks had risen from 187 a year to 196. There were 58 in October to December, against 49 in the same months a year earlier.

Our first change was a closing checklist with a photo of the finished work. It did not work. Technicians skipped it on about six jobs in ten, and it was skipped most often on the busiest days, when callbacks are most likely. FROM YOUR DATA

We changed two things, and both were your decisions. You worked alongside technician D on six Fridays in January and February. And every Monday, each callback from the week before is reviewed with the technician who did the first job, with a reason recorded. The checklist was cut from nine steps to three.

There were 34 callbacks in January to March, against 59 a year earlier. Technician D had 22 in the autumn quarter and 9 in this one. The yearly figure is now 171. FROM YOUR DATA

The reasons are recorded for the first time. Of the 34, 13 were a part that failed, 11 were a second fault that was not found on the first visit, 6 were workmanship, and 4 were not a fault at all.

**This cost you about 50 hours in the truck.** Those hours are not in your office hours on the scorecard. *Our estimate, from six days at about 8 hours.*

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## What needs adjusting now

**The install crews are now what slows things down.** Faster answers and followed up estimates sold more replacements, and the next step is two crews. In January to March you sold 102 replacements: 71 water heaters and 31 furnaces and boilers. A year earlier it was 80. The wait from a yes to the install grew from 2 days to 6. FROM YOUR DATA

In winter that wait loses work you have already won. 9 customers who said yes in February and March cancelled before the install, worth \$34,200. A year earlier, 2 did. Install crew overtime was \$6,900 in premium pay this quarter, against \$4,100 a year earlier. FROM YOUR DATA

This is a problem the improvement caused. It was not visible in September because the estimates were not being won.

**The decision for you.** 38 of the 71 water heaters were a tank swapped for the same size tank in the same place. Technicians A and B, each with their apprentice, could install those the same day they are sold. Your install crews would keep the furnaces, the boilers and the harder water heater jobs. That is about 3 installs

a week moved off the crews, and we expect the wait to come back to about 3 days. *Our estimate, from this quarter's job lengths.*

It has a cost. Each install uses the time of about two service calls, so A and B would run about 6 fewer service calls a week between them. They are also your two best technicians on service. OUR ESTIMATE

The other choices are a third install crew, which one strong winter does not yet justify, or leaving it as it is through the slow season and deciding in September. It is your call.

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## Supporting numbers that moved

| NUMBER                                                          | 30 SEPTEMBER 2026  | 31 MARCH 2027         |
|-----------------------------------------------------------------|--------------------|-----------------------|
| Share of inbound calls missed, January                          | 26% a year earlier | 22%                   |
| Estimates with no outcome                                       | 238                | 13                    |
| Days from a technician's report to a furnace or boiler estimate | 6                  | 1                     |
| Memberships lost to a failed card                               | 131 in a year      | 6 this quarter        |
| Members with no visit in the last 12 months                     | 127                | 31                    |
| Service invoices with a part in the notes and none billed       | 412 in a year      | 9 this quarter        |
| Warranty parts with no claim filed                              | 37 in a year       | 0 this quarter        |
| Discounts given                                                 | \$38,200 in a year | \$6,100 this quarter  |
| Cost per booked job, Google Ads                                 | \$200              | \$152                 |
| Share of Google Ads spend on unwanted searches                  | 37%                | 6%                    |
| Ad calls that can be tied to a customer                         | None               | 92%                   |
| New Google reviews                                              | 38 in a year       | 61 in six months      |
| Callbacks with a recorded reason                                | None               | 34 of 34 this quarter |
| Drive time per service truck per day                            | 2.3 hours          | 2.0 hours             |
| Money owed for more than 60 days                                | \$41,000           | \$19,500              |
| Office hours a week copying between programs                    | 9                  | 2                     |
| Software cost a year                                            | \$21,840           | \$18,660              |
| Overtime premium paid, last 12 months                           | \$30,000           | \$32,800              |

Overtime went the wrong way. All of the rise is the install crews, and it is part of the problem in section 5.

**Why memberships ended this quarter.** 41 ended. 22 were cancelled by the customer, 13 moved or sold the house, and 6 had a card fail and could not be reached.

**Google Ads, with a cost.** You spent \$10,200 this quarter, down from about \$13,200, and 67 booked jobs can be tied to it. With call reporting on, this is the first quarter the figure is complete, so it cannot be compared fairly with last year's count.

07

## Changes to what we measure

- **Added to the scorecard:** days from a yes to the install. It was not a problem six months ago and it is the main one now.
- **Retired:** open items held only in the dispatcher's spreadsheet. The spreadsheet was retired in December, so the number can no longer be anything but zero.

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

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## Next quarter

| FIX                  | WHAT GETS DONE                                                                                                                                                                          | WHAT WE WILL WATCH                                                                                  |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| 1. The install wait  | If you approve, technicians A and B install same size tank water heaters the day they are sold, from April.                                                                             | Days from a yes to the install. Cancellations after a yes. Service calls run by A and B.            |
| 2. Member visits     | April to June is your slowest quarter. Every member who is owed a tune up visit is offered a date in it. Technicians C and D offer the plan on every call, using the words A and B use. | Members with no visit in 12 months. Memberships sold by technician. Jobs per service truck per day. |
| 3. Old water heaters | Your records show 412 water heaters that are ten years old or more. Each of those customers gets a short note in your voice with a price to replace it before it fails.                 | Replies. Estimates given. Replacements sold from the list.                                          |

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

**Your technicians.** The gap between your highest and lowest average ticket was \$98 in September and is \$81 now. It is closing slowly, and nearly all of the change is parts being billed.

## What we still cannot tell

- **Whether the callback gain will hold.** One quarter with the owner in the truck is not a pattern. The test is the next heating season, without you there.
- **True profit on each job.** Truck stock lists went in during February. A full year of parts assigned to jobs is needed.

- **Why customers say no.** A reason has been recorded on estimates marked lost since November. 61 reasons so far is too few to read.



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