

The Monday Packet

Week of Aug 10–16 · prepared for the owner of a ~\$12M home-services company running HVAC, plumbing, and electrical (fictional). Built from your field-service software and QuickBooks. In your inbox every Monday at 6:30am — nobody assembles it.

THREE THINGS THAT NEED YOU THIS WEEK

- 1

Chase the 17 techs holding job paperwork — \$38,400 of finished work can't invoice. SERIOUS · \$38,400

17 of the 41 stuck tickets are waiting on tech paperwork. The packet lists the techs by name so the office chases people, not paper.
- 2

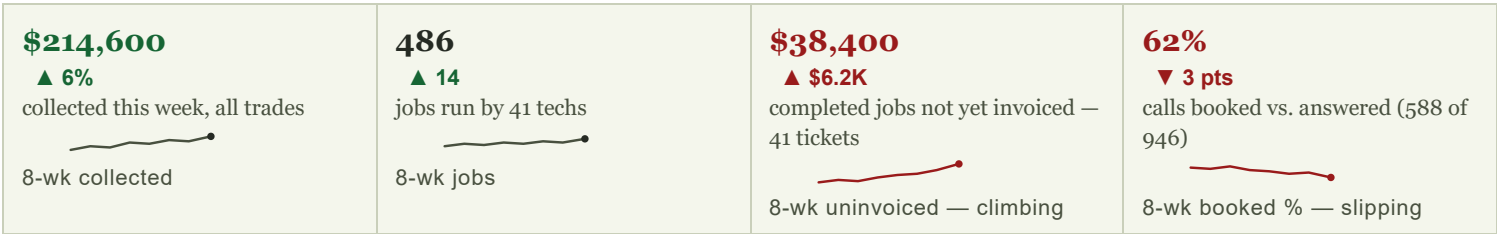
Put the three lagging CSRs on your top bookers' script — the booking gap is the week's biggest lever. WATCH · ~\$40K/WK

Your two best CSRs booked 71% of answered calls; the other three averaged 54%. Call volume by hour is attached for scheduling.
- 3

Fill September from the 210 members owed a tune-up — none are on the calendar. WATCH · ~\$93K

That's two slow September weeks filled from customers you already have — at the week's blended ~\$442 ticket, roughly ~\$93,000 of schedule.

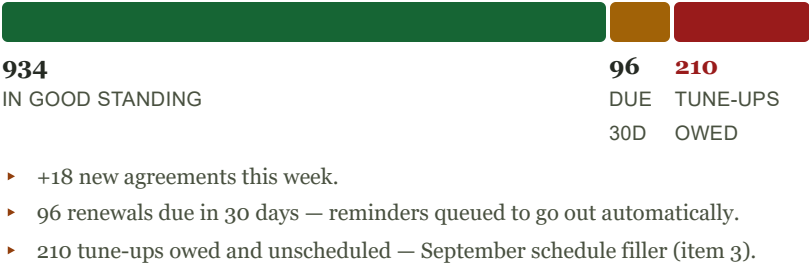
THE WEEK IN FOUR NUMBERS — WITH THE EIGHT WEEKS BEHIND THEM



BY TRADE — JOBS, REVENUE, AND AVERAGE TICKET

TRADE	JOBS	REVENUE	AVG TICKET	— \$350 TARGET	NOTE
HVAC	212	\$118,900		\$561	install season tailing off
Plumbing	148	\$54,200		\$366	steady
Electrical	74	\$27,300		\$369	two panel upgrades sold from tune-ups — see item 3 above
Drain / other	52	\$14,200		\$273	weekend calls up

MEMBERSHIPS — 1,240 ACTIVE AGREEMENTS, BY STATUS



CALLS — 946 ANSWERED

