

KEY PROFIT INDICATOR TRACKING

“What Fire to put out FIRST!”

CSR	Ideal Conversion Rate (70% or better)	Actual Conversion Rate
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 Below ideal: (1) check training
 (2) check trip charge rate

TECH	Ideal Conversion Rate (70% or better)	Actual Conversion Rate
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 Below ideal: (1) check training
 (2) check trip charge rate

*a low trip charge can sometimes feed unqualified leads to the techs.

TECH	Target Ave. Sale Plumbing	Actual Average Sale Plumbing
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_____	_____
HVAC Service	HVAC Service

_____	_____
HVAC Replacement	HVAC Replacement

PROFIT MODEL

	Service Target	Actual	Replacement Target	Actual
Direct Labor Cost <small>INCLUDING TAXES, WORKMANS COMP AND BENEFITS</small>	25%	_____	15%	_____
Equipment Cost <small>EQUIPMENT HAS A SERIAL NUMBER</small>	0%	_____	25%	_____
Material Cost <small>MATERIALS DO NOT HAVE A SERIAL NUMBER</small>	15%	_____	7%	_____
Gas	2%	_____	2%	_____
Profit	18%	_____	18%	_____
Overhead	40%	_____	33%	_____

If Labor Number is off: check 1) pricing, 2) call back rate, 3) hourly efficiency for over staffing.

If Materials is off: check 1) pricing, 2) theft, 3) overstocking.

If Overhead is off: check unnecessary expenses and/or actual sales goals.

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