

# Key Profit Indicator Tracking

CSR	Ideal Conversion Rate (70% or better)	Actual Conversion Rate
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Below <u>ideal</u> : (1) check training (2) check trip charge rate	
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TECH	Ideal Conversion Rate (70% or better)	Actual Conversion Rate
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Below <u>ideal</u> : (1) check training (2) check trip charge rate	
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\*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
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HVAC Replacement	HVAC Replacement
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## PROFIT MODEL

	Service Target	Actual	Replacement Target	Actual
Direct Labor Cost INCLUDING TAXES, WORKMANS COMP AND BENEFITS	25%	_____	15%	_____
Equipment Cost EQUIPMENT HAS A SERIAL NUMBER	0%	_____	25%	_____
Material Cost MATERIALS DO NOT HAVE A SERIAL NUMBER	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.