AdhesionCo

EXAMPLE REPORT

MONTHLY VALUE REPORT

Example Plumbing Co.

October 14 – November 13, 2026
Report November 14, 2026
Prepared by Randy Warner, Adhesion Co.

VALUE DELIVERED, AT THE VALUES YOU CONFIRMED	ESTIMATED HOURS SAVED	RUNS THAT WENT THROUGH	OPEN ISSUES
$4,820	**39 hrs**	**99%**	**0**
up $610 from last month	up 4 from last month	about the same	down 1

A steady month. Quote follow-up did the most work, review requests went live, and both issues were fixed quickly.

BY WORKFLOW

WORKFLOW	DELIVERED	HOURS SAVED	VALUE	RUNS WENT THROUGH
Quote follow-up, three touches	54 quotes followed up	9 hrs	$2,160	162	100%
Missed-call text-back	41 texts sent	3 hrs	$1,230	41	98%
Overdue invoice reminders	38 reminders sent	5 hrs	$950	76	96%
Review requests after payment	96 requests sent	5 hrs	$480	96	100%
Web leads into Jobber and the CRM	112 leads	11 hrs	–	118	100%
Weekly jobs and revenue report	4 reports	6 hrs	–	4	100%

RELIABILITY AND ISSUES

4	0	0	2	0
Failures	Warnings	Exceptions	Skipped runs	Missed heartbeats

Issues opened **2** · resolved **2** · average time to resolve **about 14 hours**

YOU REPORTED

- Duplicate customer created in Jobber
  Resolved, Nov 3

WHAT WE BUILT OR CHANGED

- Review requests after payment
  New workflow, live since Oct 22

Quote follow-up now stops as soon as a quote is approved in Jobber.

FOR OUR STRATEGY CALL

Next call: **Tuesday, November 18 at 10:00 AM ET**

- Quote follow-up delivered the most value. Review the third message to lift replies.
- Next build: maintenance plan reminders for tank water heater customers.
- Agree who gets alerted if the Jobber connection drops again.

SINCE WE STARTED

$15,960	141 hrs	4 months
Value delivered	Estimated hours saved	Under management

Value uses the dollar value per unit you confirmed for each workflow; a dash means none was set. Hours are our estimate of minutes saved per unit. Units are not added across workflows.