AdhesionCo

OPERATIONAL AUDIT RESULTS

Example Plumbing Co.

Residential plumbing · 9 people · Jobber and QuickBooks

ESTIMATED NEW REVENUE

$6,240–$16,220 a month

OFFICE HOURS FREED

37–87 a month

Session October 30, 2026
Report November 4, 2026
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EXAMPLE REPORT

Example business. Figures are illustrative.

SUMMARY

Here is what your own numbers say.

Every figure below comes from the numbers you gave us, with a low and a high estimate for each. We lead with the low one.

ESTIMATED NEW REVENUE PER MONTH

$6,240 to $16,220

About $2,810 to $7,300 of profit at your 45% margin.

OFFICE HOURS FREED PER MONTH

37 to 87 hrs

Worth $1,030 to $2,425 of time. Not added to the revenue figure.

OVERDUE INVOICES RECOVERED, ONE-TIME

$4,500 to $9,000

Money you have already earned. Kept apart from the monthly figures.

YOUR TOP OPPORTUNITIES

		LOW ESTIMATE	HIGH ESTIMATE	
01	Get more customers	$4,500	$11,790	new revenue per month
02	Earn more from existing customers	$1,740	$4,430	new revenue per month
03	Spend less to run the business	37 hrs	87 hrs	hours freed per month

KEY NUMBERS YOU GAVE US

- 120 requests a month, 40% booked
- 60 quotes a month, 35% accepted
- $450 average job, $1,800 average quote
- Office manager: 17 to 25 hours a week on repetitive work, at $28 an hour
- $18,000 overdue today

HOW TO READ THIS

Low estimate first. Hours are shown with their dollar value beside them and are not added to the dollar total. The overdue amount is one-time and is kept apart from the monthly figures.

01 · OPPORTUNITY

Get more customers

LOW TO HIGH, PER MONTH

$4,500 to $11,790

These numbers show how many requests and quotes turn into jobs today, and what faster replies and steady follow-up would add.

Faster replies to new requests

Requests that arrive after 5 p.m. or on weekends wait until the next business day. A reply within minutes books more of the requests you already get.

YOUR NUMBERS	120 requests a month · 40% booked · $450 average job
ASSUMPTION	Booked share rises from 40% to 42% (low) or 45% (high)

LOW
$1,080
HIGH
$2,700
per month

Quote follow-up

Quotes get one follow-up call when the office has time. Three follow-ups by text and email win more of the quotes you already send.

YOUR NUMBERS	60 quotes a month · 35% accepted · $1,800 average quote
ASSUMPTION	Accepted share rises from 35% to 38% (low) or 43% (high)

LOW
$3,240
HIGH
$8,640
per month

Reviews and referrals

Reviews and referrals are asked for now and then, by hand. Asking every customer after every paid job brings in more referral work.

YOUR NUMBERS	4 referral jobs a month · $450 average job
ASSUMPTION	Referral jobs rise 10% (low) or 25% (high)

LOW
$180
HIGH
$450
per month

WORTH A LOOK, NO ESTIMATE

Lead sources — About $2,400 a month goes to Google Ads, Local Services Ads, and Angi, but jobs and revenue are not tracked by source. Track them first; then move spend toward the sources that pay.

02 · OPPORTUNITY

Earn more from existing customers

LOW TO HIGH, PER MONTH

$1,740 to $4,430

Past and current customers are usually your cheapest revenue. These numbers size that opportunity.

Bringing back past customers

1,200 customers have not booked in over a year, and no one contacts them. A seasonal reminder brings some of them back.

YOUR NUMBERS	1,200 past customers · $450 average job
ASSUMPTION	2% (low) or 5% (high) rebook each year: 2 to 5 jobs a month

LOW
$900
HIGH
$2,250
per month

A maintenance plan

There is no plan today. A $20-a-month plan for annual water heater flushes and inspections suits the customers with a tank water heater.

YOUR NUMBERS	800 eligible customers · $20 a month
ASSUMPTION	3% (low) or 8% (high) enroll: 24 to 64 members

LOW
$480
HIGH
$1,280
per month

Add-ons at the visit

Techs mention extra work when they think of it. A short prompt in Jobber at each visit raises the share of jobs with an add-on.

YOUR NUMBERS	150 jobs a month · 10% with an add-on · $120 average add-on
ASSUMPTION	Share with an add-on rises from 10% to 12% (low) or 15% (high)

LOW
$360
HIGH
$900
per month

Overdue invoices (one-time)

$18,000 is overdue today, and reminders go out when someone remembers. Automatic reminders at 3, 7, 14, and 28 days recover part of it. This is a one-time amount, so it is not in the monthly total.

YOUR NUMBERS	$18,000 overdue
ASSUMPTION	25% (low) or 50% (high) recovered

LOW
$4,500
HIGH
$9,000
one-time

03 · OPPORTUNITY

Spend less to run the business

LOW TO HIGH, PER MONTH

37 hrs to 87 hrs

Hours on repetitive work are hours we can give back. Each is valued at what that person's time costs.

REPETITIVE TASK	WHO DOES IT	HOURS A WEEK
Typing web leads into Jobber and the CRM	Office manager	**5–7**
Chasing overdue invoices by phone	Office manager	**4–6**
Moving timesheets into payroll	Office manager	**3–5**
Rescheduling and dispatch changes	Office manager	**3–4**
Building the weekly jobs and revenue report	Office manager	**2–3**
Total		**17–25**

Office hours freed

Most of this work is the same steps every time, which is the kind of work that runs on its own once it is connected.

YOUR NUMBERS — 17 to 25 hours a week · $28 an hour

ASSUMPTION — 50% of the low end (8.5 hrs a week) or 80% of the high end (20 hrs a week), times 4.33 weeks

LOW

37 hrs

HIGH

87 hrs

a month, worth $1,030–$2,425

WORTH A LOOK, NO ESTIMATE

Payroll corrections — About two corrections a month. No dollar cost was given, so none is counted.

THE ONE TASK YOU WOULD HAND OFF TOMORROW

“Chasing people who haven't paid.”

WHAT TO DO FIRST

Start with one project.

One project that covers the two largest monthly opportunities and the overdue balance, and takes 9 to 13 hours a week off the office manager.

RECOMMENDED FIRST PROJECT

Lead-to-Cash

- ✓ New web requests go into Jobber and the CRM on their own
- ✓ A reply within minutes, nights and weekends included
- ✓ Three quote follow-ups by text and email
- ✓ Overdue invoice reminders at 3, 7, 14, and 28 days

ESTIMATED VALUE	LOW	HIGH
New revenue per month	**$4,320**	$11,340
Overdue invoices recovered (one-time)	**$4,500**	$9,000
Office hours freed per month	**19 hrs ($545)**	45 hrs ($1,260)

Includes 60 days of looking after it: monitoring, a monthly value report in dollars and hours, and a strategy call each month.

Your proposal, sent separately, has the price and timeline. The $798 audit fee is credited in full toward this project if you sign within 14 days.

AFTER THAT, IN ORDER OF VALUE

Bringing back past customers	$900–$2,250 a month
A maintenance plan	$480–$1,280 a month
Add-ons at the visit	$360–$900 a month
Reviews and referrals	$180–$450 a month
Payroll, reporting, and scheduling hours	17–42 hrs a month

INPUTS AND ASSUMPTIONS

Where every number comes from.

Your numbers set the starting point. Our fixed assumption table sets the change. Nothing comes from outside benchmarks.

YOUR NUMBERS

ITEM	VALUE	SOURCE
Requests per month	**120**	From Jobber
Share of requests booked	**40%**	Self-reported, checked on the call
Average job	**$450**	From Jobber
Quotes per month	**60**	From Jobber
Share of quotes accepted	**35%**	From Jobber
Average quote	**$1,800**	From Jobber
Referral jobs per month	**4**	Self-reported
Past customers, no booking in 12 months	**1,200**	From Jobber
Customers eligible for a plan	**800**	Self-reported
Jobs per month	**150**	From Jobber
Jobs with an add-on / average add-on	**10% / $120**	Self-reported
Overdue today	**$18,000**	From QuickBooks
Office manager hours on repetitive work	**17–25 a week**	Self-reported range
Office manager hourly cost	**$28**	Self-reported
Gross margin	**45%**	Self-reported, rough

ASSUMPTIONS USED

CHANGE	LOW	HIGH
Speed to reply: share of requests booked	**+2 pts**	**+5 pts**
Quote follow-up: share of quotes accepted	**+3 pts**	**+8 pts**
Referral jobs per month	**+10%**	**+25%**
Past customers who rebook per year	**2%**	**5%**
Eligible customers who enroll in a plan	**3%**	**8%**
Share of jobs with an add-on	**+2 pts**	**+5 pts**
Overdue amount recovered (one-time)	**25%**	**50%**
Hours removed from repetitive tasks	**50% of low**	**80% of high**

MISSING OR ROUGH

- Gross margin is a rough figure; profit figures use it as given.
- Jobs and revenue by lead source are not tracked, so lead sources carry no estimate.
- No dollar cost was given for payroll corrections, so none is counted.