



PIPECORE
INTELLIGENCE FOR PLUMBING COMPANIES

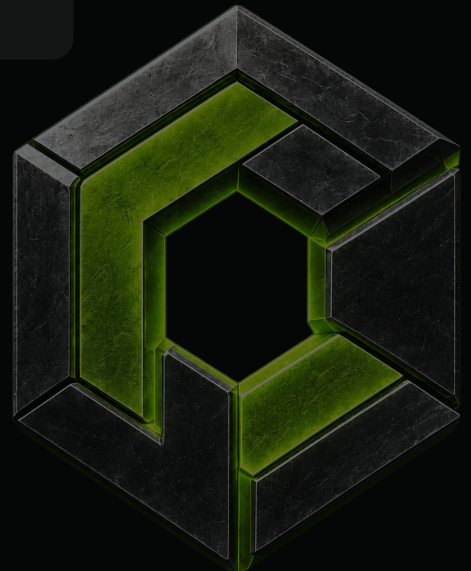
FREE 10-MINUTE OWNER SCORECARD

THE PLUMBING COMPANY REVENUE LEAK SCORECARD

Find the weakest place your plumbing company may be losing booked work, cash, or capacity - then choose one measurable next move.

5 SYSTEMS | 15 CHECKS | 1 NEXT MOVE

Fillable on screen. Printer-friendly inside.



START HERE

Score what actually happens

Choose one answer for every statement: 0 for No, 1 for Sometimes, and 2 for Yes. A Yes means the entire statement is true today.

COMPANY

DATE

COMPLETED BY

0

NO

No dependable process

1

SOMETIMES

Manual or inconsistent

2

YES

Visible, owned, repeatable

Read each section score this way

0-2

VERIFY NOW

The control is absent or unreliable.

3-4

INCONSISTENT

Working pieces still depend on memory.

5-6

CONTROLLED

The process is visible and repeatable.

Your result

TOTAL SCORE (BASELINE ONLY)

LOWEST-SCORING CONTROL

Use the total to compare later. Use the lowest section to decide what to verify first.

IMPORTANT

This scorecard does not prove revenue loss. It shows where an operating control may be weak. Verify the lowest section with one week of real company data before choosing a fix.

RULE OF THUMB: VERIFY ONE LEAK. DO NOT TRY TO FIX ALL FIVE AT ONCE.

Where booked work disappears

1. LEAD CAPTURE AND MISSED CALLS

Does every qualified opportunity get a visible next step?

1

Every missed call and online lead appears in one visible lead list.



NO



SOMETIMES



YES

2

Every new lead has a named owner and a response deadline.



NO



SOMETIMES



YES

3

Lead-to-booked-job conversion is reviewed each week.



NO



SOMETIMES



YES

VERIFY WITH Pull 7 days of missed-call and online-lead records.

SECTION SCORE

OUT OF 6

2. ESTIMATE RECOVERY

Are open estimates managed as a visible pipeline instead of left to memory?

4

Every open estimate has a next follow-up date.



NO



SOMETIMES



YES

5

One person is clearly responsible for each open estimate.



NO



SOMETIMES



YES

6

Open, won, and lost estimate value is reviewed each week.



NO



SOMETIMES



YES

VERIFY WITH List open estimates older than 48 hours without a next step.

SECTION SCORE

OUT OF 6

Where capacity gets consumed

3. SCHEDULING AND FIELD CAPACITY

Does the schedule reflect real technician capacity and job requirements?

7

Available capacity is visible by technician and skill at least 7 days ahead.



NO



SOMETIMES



YES

8

Schedule gaps, delays, and overtime are reviewed each week.



NO



SOMETIMES



YES

9

The reason for each moved job or technician is recorded.



NO



SOMETIMES



YES

VERIFY WITH Compare available and scheduled technician hours for the next 7 days.

SECTION SCORE

OUT OF 6

4. CALLBACKS, REWORK, AND REPEAT TRIPS

Does lost field capacity become evidence that improves the process?

10

Every callback or repeat trip receives one root-cause category.



NO



SOMETIMES



YES

11

Callback patterns are reviewed by technician, job type, and cause.



NO



SOMETIMES



YES

12

After a process change, callback results are reviewed on a set date.



NO



SOMETIMES



YES

VERIFY WITH Categorize the last 10 callbacks or repeat trips.

SECTION SCORE

OUT OF 6

Can the owner see the next move?

5. WEEKLY OPERATING VISIBILITY

Does the owner have a small, trusted view of what needs attention now?

13

The weekly operating scoreboard fits on one page.



NO



SOMETIMES



YES

14

Each metric has one trusted definition and source.



NO



SOMETIMES



YES

15

The highest-priority issue has an owner, target, and review date.



NO



SOMETIMES



YES

VERIFY WITH Rebuild last week's scoreboard from the source systems.

SECTION SCORE

OUT OF 6

Estimate one monthly opportunity

Use actual data and conservative assumptions.

MISSED-CALL OPPORTUNITY

Example: $12 \times 25\% \times \$650 = \$1,950/\text{month}$

UNRECOVERED QUALIFIED LEADS

INCREMENTAL BOOKING RATE

AVERAGE BOOKED-JOB VALUE

MONTHLY OPPORTUNITY

ESTIMATE-RECOVERY OPPORTUNITY

Example: $\$40,000 \times 5\% = \$2,000/\text{month}$

FOLLOW-UP ELIGIBLE VALUE

INCREMENTAL CLOSE-RATE LIFT

MONTHLY OPPORTUNITY

CAPACITY OPPORTUNITY

Example: $20 \text{ hrs} \times 60\% \times \$250 = \$3,000/\text{month}$

RECOVERABLE TECHNICIAN HOURS

REALISTIC DEMAND/FILL RATE

REVENUE PER PRODUCTIVE HOUR

MONTHLY OPPORTUNITY

IMPORTANT

Treat the result as an investigation range, not guaranteed revenue. Confirm every input in the systems your company already uses.

YOUR 7-DAY NEXT MOVE

Do not fix five things. Verify one leak.

Complete this plan for the lowest-scoring control. One owner, one change, and one review date are enough.

LOWEST-SCORING CONTROL

CURRENT SECTION SCORE

TARGET SCORE

ONE WEEK OF EVIDENCE WE WILL PULL

WHAT THE EVIDENCE SHOWS ABOUT THE CURRENT PROCESS

ONE CHANGE WE WILL TEST

OWNER

BASELINE

KPI

REVIEW DATE

DECISION RULE AFTER 7 DAYS

WANT A SECOND SET OF EYES? Reply to the delivery email with your lowest score. Caleb will tell you which evidence to pull first.

IF THE CAUSE IS STILL UNCLEAR

The \$299 PipeCore Company Audit

Two calls, private analysis, a workflow map, one ranked next move, and a measurement plan.

START THE PIPECORE AUDIT