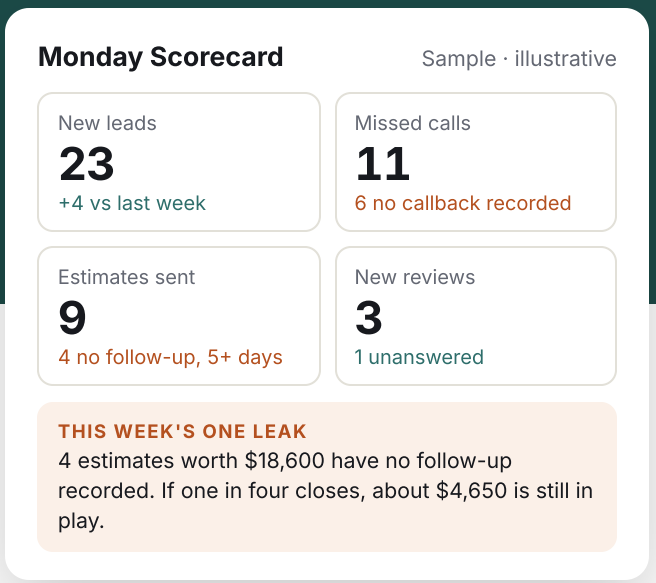
Plain Sight

FREE PRACTICAL TOOL

The Service Business Leak Scorecard

A 15-minute Monday check to find where leads, estimates and follow-up are slipping, and roughly what it's costing you.

15 minutes a week | No new software



WHAT'S INSIDE

1. The 7 leaks that show up most in service businesses
2. Where to find each number in systems you already use
3. A simple, conservative way to put a dollar figure on it
4. A one-page scorecard to fill in every Monday
5. What to do with the biggest leak each week

For local service businesses: contractors, HVAC, plumbing, roofing, landscaping and similar teams with crews in the field and a steady flow of leads.

WHY THIS EXISTS

You know work is slipping. The question is where.

Most owners can feel it. Very few can say exactly where it's happening or what it cost this month. This scorecard gives you a simple weekly way to find out, using data you already have: phone alerts, estimate reports, Google reviews and form emails.

It's not software.

It's a 15-minute check you run every Monday, on paper or in a note on your phone.

THE 7 MOST COMMON OPERATIONAL LEAKS

Where money quietly walks out the door

1 **Aging estimates with no follow-up** USUALLY THE BIGGEST $

Estimates sit for 5, 7, 10+ days with no recorded next step. This is usually the largest dollar leak in the business.

2 **Missed calls with no callback recorded**

Inbound calls that never get a documented return call. Many owners assume someone handled it.

3 **Leads that stall after first contact**

A lead comes in, gets a first response, then silence. No second touch, no appointment set.

4 **Reviews that go unanswered**

New Google reviews, especially mixed or negative ones, sitting without a reply. Future customers notice.

5 **No reliable lead-source tracking**

You can't say what share of work came from Google, referrals, your website or ads.

6 **Big jobs that quietly died**

Larger opportunities that never got a second quote or site visit after the first conversation.

7 **No weekly visibility at all**

You only find out when a customer complains or a month ends soft.

STEP 1 · ABOUT 15 MINUTES

How to pull the numbers

No new software. Every number below comes from something that already lands in your inbox or sits in your systems.

Missed calls ~4 min

Most business phone systems, or the app that runs them, email you when a call is missed. Count last week's missed calls and how many have no clear callback note.

Look in: phone system alerts or call log

Leads & estimates ~6 min

Count last week's website form emails. In your estimating or scheduling software, list estimates sent in the last 7–14 days and mark any with no follow-up recorded.

Look in: form notifications, estimates list

Reviews ~2 min

Open your Google Business Profile. Count new reviews from the last 7 days and note any still without a reply.

Look in: Google Business Profile

Lead sources ~3 min

Tally last week's new leads by where they came from: Google, referral, website, ads, other. A rough count still tells you a lot.

Look in: CRM notes, intake forms, your memory

STEP 2

Turn a number into a rough dollar figure

Keep it conservative. The point is to make the cost of doing nothing visible, not to inflate it.

$18,600
4 estimates with no follow-up recorded in 5+ days

×

1 in 4
a cautious guess at how many still close

=

~$4,650
still in play if someone follows up this week

> Don't assume every unanswered item was lost. Some got handled by text or a cell phone and just weren't recorded. Count what you can see, and say so.

STEP 3 · PRINT THIS PAGE

Your Monday Scorecard

Week of _____ Filled in by _____

METRIC	THIS WEEK	NOTES / $ IMPACT
WHAT CAME IN		
New leads		
Estimates sent		
New Google reviews		
WHAT SLIPPED		
Missed calls		
Missed calls, no callback recorded		
Estimates, no follow-up recorded (5+ days)		
Unanswered reviews		
THE ONE THING		
Biggest single leak this week		
Rough dollar value still in play		
One action I'll take this week Who owns it · check by Friday		

FOUR-WEEK VIEW

Track the same leak	Week 1	Week 2	Week 3	Week 4
Calls, no callback				
Estimates, no follow-up				
$ still in play				

Rule: pick only one leak to act on each week. Visibility and one clear next step, not a long list of problems.

STEP 4

What to do with the biggest leak

1

Make it small

Pick a next action you can finish this week.

2

Assign it

Name an owner, even if it's you.

3

Set a check

"By Friday, has this moved?"

4

Write it down

So next Monday's scorecard has context.

WHEN TO STOP DOING THIS YOURSELF

Same leak, three weeks running?

If you keep finding the same high-value leak, the problem usually isn't knowing about it. It's consistent attention and follow-through. That's when having someone else pull the numbers and surface one priority each Monday starts to pay off.



WANT THIS DONE FOR YOU EVERY MONDAY?

Plain Sight does the pulling. You fix the one thing.

Forward copies of the alerts you already get. Every Monday you get a one-page snapshot with the numbers and the single most valuable thing to fix. No passwords, no new software. A free 30-day pilot is open to a small number of Central Florida businesses.

plainsightops.com

snapshot@plainsightops.com

Plain Sight · Oviedo, Florida