

Stop The Bleed.

7 profit leaks every trade owner
is sitting on right now.

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WHAT THIS IS

The bleed list.

Your business is already making the money. You are just not keeping it. This guide shows you the 7 places it is leaking out. Plus how to plug each one.

This is not theory.

This is not motivation.

This is a list of leaks with dollar numbers and a 30-day plan to stop them.

You will read this in 15 minutes. You will find at least 3 leaks in your shop before you finish page 11. Most owners find all 7.

THE PROMISE

Stop the bleed and the money shows up. No new sales needed.

Every dollar you stop losing is a dollar that hits your bank without one more truck roll. Without one more job. Without one more customer. It is already in the building. You just have to stop it from walking out.

A REAL OWNER, REAL NUMBERS

Jason was bleeding \$284 a call.

Jason runs an HVAC shop in Longwood, Florida. Two trucks. One scheduler. About \$1.2M a year in revenue. He thought he ran a tight ship. He did not.

We ran one audit. We pulled his last 60 invoices. We pulled his tech notes. We compared the two.

On every single service call his techs were doing extra work and not billing it. Small stuff. A capacitor here. A drain flush there. A filter swap. Sometimes a part. Sometimes 15 minutes of labor. Sometimes both.

The average miss was \$284 per service call. He ran about 40 service calls a week.

THE RECOVERY

About \$11,000 a week. Money he was already making.

We did not raise his prices. We did not change his ads. We did not hire anyone. We changed how the work got billed. That is it. The cash showed up the next week.

This is one leak. There are 6 more in your shop right now. Some are smaller. Some are bigger. They are all in the same building, every day, walking out the door.

PART 1

The 7 leaks.

Each one is named on its own page. With the dollar number. With how to spot it. With how to plug it. Read them in order.

#	THE LEAK	WHAT IT COSTS
1	Unbilled work on service calls	\$200 to \$400 per call
2	Missed inbound phone calls	\$300 to \$2,000 per missed call
3	Slow follow-up on quotes	Close rate cut in half after 48 hours
4	Pricing that has not been raised	5% to 8% margin loss per year
5	Truck stock walking off	\$1,000 to \$3,000 per truck per year
6	Techs giving discounts at the truck	10% to 15% gross margin loss
7	Maintenance plans that do not renew	25% to 30% preventable churn

If only three of these are happening in your shop you are likely leaving \$80,000 to \$150,000 a year on the table. That is the size of a second truck. That is a real raise for you. That is a real vacation.

LEAK 1 OF 7

\$200 to \$400

Unbilled work on service calls.

What it is.

Your tech is on a call. They fix the thing the customer called about. Then they do one or two extra things. A drain flush. A capacitor check. A filter swap. A small part. Five minutes of extra labor. They do not write it on the invoice. They tell themselves it is small. Multiply that by every call, every week, every year.

How to spot it in your shop.

Pull your last 20 service invoices. Pull the tech notes for the same 20 jobs. Read them side by side. Look for anything in the notes that is not on the invoice. Count the items. Estimate the dollar value. Multiply by 50 weeks. That is your number.

How to plug it.

Two changes. First, make the tech read the invoice out loud to the customer before they hit done. Second, the tech writes a one-line note for every item they touched, even if it was free, and the office checks every invoice against the note before it goes out. Both changes take a week to install.

LEAK 2 OF 7

\$300 to \$2,000

Missed inbound phone calls.

What it is.

The phone rings while you are on a roof, in a crawl space, or driving. It goes to voicemail. Most callers do not leave one. They call the next shop. Each missed call is a job you will never see. The average residential service ticket is \$300 to \$600. The average install lead is worth \$2,000 or more.

How to spot it in your shop.

Pull your call log for last week. Count total inbound calls. Count how many went to voicemail. Divide. If 15% or more went to voicemail you are bleeding real money every single day. Most owner-operated shops are between 18% and 30%.

How to plug it.

Stop answering the phone yourself. Even part time. Get one person on the phone during business hours, every hour. A scheduler. A virtual assistant. A spouse. Anyone but you. Pair them with a one-page script. Goal is zero missed calls Monday through Friday, 8 to 5. The script is in this guide on page 15.

LEAK 3 OF 7

Close rate cut in half

Slow follow-up on quotes.

What it is.

You send a quote. You do not follow up. Or you follow up a week later. By then the customer has called two more shops. The close rate on a same-day follow-up is around 40% to 50%. The close rate after 48 hours drops to 20% to 25%. After a week it is under 10%. The quote you wrote was already half the work.

How to spot it in your shop.

Pull your last 20 quotes. Mark the ones you followed up on within 24 hours. Mark the ones you did not. Compare close rates. The gap is the leak. For most owner-operated shops the gap is at least 15 to 20 percentage points.

How to plug it.

Set a rule. Every quote gets a follow-up call within 24 hours and a follow-up text within 72 hours. Put it on the scheduler. Put it in the CRM. Make it not your job. The script for the call is on page 15. The text is one line. Both are in this guide.

LEAK 4 OF 7

5% to 8% per year

Pricing that has not been raised.

What it is.

Costs go up every year. Parts. Fuel. Labor. Insurance. If your prices have not gone up in 12 months you are running a smaller business than you were last year. If they have not gone up in 24 months you have lost about 10% of your margin. That comes straight out of your take-home.

How to spot it in your shop.

When was the last time you raised your service call rate? When was the last time you raised your hourly labor rate? When was the last time you re-priced your top 10 most installed parts? If any answer is more than 12 months, you have a leak the size of the price gap.

How to plug it.

Set a 5% across-the-board price increase. Effective the first of next month. Tell every team member to expect three or four complaints. Most owners get zero. Then set a calendar reminder for 11 months from now to do it again. That is it. No big rebrand. No customer letter. Just the new price on the new invoice.

LEAK 5 OF 7

\$1,000 to \$3,000 per truck

Truck stock walking off.

What it is.

Parts on your trucks go missing. Not stolen. Just used and not billed. A tech grabs a fitting for one job, uses it on a different job, and the original invoice never gets updated. Or the part gets used on a warranty call and never gets pulled from inventory. Per truck per year this is \$1,000 to \$3,000 in pure shrink. Multiply by your truck count.

How to spot it in your shop.

Do a Saturday morning truck count. Pick one truck. Count every part on it. Compare to what the system says should be on it. Pick the 10 parts that are off the most. Those are your leak items. Do the same for the next truck the next week.

How to plug it.

Two changes. First, every tech does a 10-minute end-of-week truck restock and writes down what they used. Office checks this against invoices on Monday morning. Second, the top 20 most-used parts get a barcode or color tag and a min-max level. When the level hits min, it gets restocked. Both changes take a month to install.

LEAK 6 OF 7

10% to 15% margin

Techs giving discounts at the truck.

What it is.

Your tech wants the sale. The customer pushes back on the price. The tech knocks 10% off to close it. The tech feels good. The customer feels good. You just lost the entire profit margin on that job. Most owner-operated shops lose 10% to 15% of gross margin to truck-level discounts they never approved.

How to spot it in your shop.

Pull your last 30 invoices that had a discount applied. Look at who applied the discount. Look at the dollar amount. Add it up. That is what you paid your techs to close jobs that would have closed anyway. Most of them would have.

How to plug it.

Take discount authority away from the techs. Set one rule. Any discount over \$50 needs a call to you or the office. Any discount over \$200 needs your name on it. Tell the team. They will push back for one week. Then they will stop discounting. Your margin comes back the same week.

LEAK 7 OF 7

25% to 30% churn

Maintenance plans that do not renew.

What it is.

You sold the plan. The customer pays monthly or yearly. The renewal comes up. The card on file fails or the customer ignores the email. The plan dies. Nobody calls to save it. In most owner-operated shops, one in four members churns every year for reasons that could have been fixed with a 5-minute phone call.

How to spot it in your shop.

Pull your member list from 12 months ago. Compare to your member list today. Count the gap. That is your annual churn. If it is over 20% you have a leak. If it is over 30% you have a hole.

How to plug it.

Build a renewal save script. Office calls every member 30 days before renewal to confirm card and remind them what is included. If a card fails, the office calls within 24 hours. Not an email. A phone call. That one change cuts most preventable churn in half.

PART 2

The 1-hour audit.

Block one hour on your calendar. Pour a coffee. Use this checklist. Print it. Check the boxes. By the end you will know which leaks you have and how much they are costing you.

You do not need to fix anything during the audit. Just count. The fix comes later.

#	THE CHECK	DONE
1	Pull last 20 service invoices and tech notes. Look for items in the notes that are not on the invoices.	☐
2	Count inbound calls last week. Count voicemails. Calculate the percentage that went to voicemail.	☐
3	Pull last 20 quotes. Mark which got 24-hour follow-up. Compare close rates between the two groups.	☐
4	Write down the last time you raised your service call rate, labor rate, and top 10 part prices.	☐

PART 2 / CONTINUED

Audit, part two.

#	THE CHECK	DONE
5	Pick one truck. Count every part on it. Compare to what the system says. Note the top 10 misses.	☐
6	Pull last 30 invoices that had a discount. Add up the total discount dollars. Note who approved each one.	☐
7	Pull member list from 12 months ago. Compare to today. Count the gap. Divide by the starting number.	☐

SCORE YOURSELF

Count how many leaks you found.

1 to 2 leaks: you are doing better than most. Still fix them. 3 to 4 leaks: typical shop. Big money on the table. 5 to 7 leaks: you have a bleed problem. Start with leak 1 and work down the list.

PART 3

Ask the team.

The team already knows where the leaks are. They will not tell you on their own. These are the questions that get the truth out. Ask one at a time. Do not interrupt. Do not defend. Just listen.

Ask the lead tech. What did you fix this week that did not make it on the invoice? I am not mad. I just want to know.

Ask the scheduler. How many calls went to voicemail last week? What time of day do most of them come in?

Ask the scheduler again. Which customers asked for a quote and never heard back from us? Show me the list.

Ask yourself. When did I last raise prices? What stopped me last time?

Ask every tech. What is on your truck right now that is not in the system? What did you use this week that you did not write down?

Ask every tech. When you discount a job, what is the reason you give yourself? How often do you do it?

Ask the office. Which members did we lose this year? Did we call any of them before they cancelled? Why not?

PART 4

Billing back.

These are the words. Plain English. No fluff. Use them. Adjust them to your trade. Practice each one out loud once before you use it.

Script 1. Tech reads the invoice.

Use this at the end of every service call. Tech reads the invoice line by line to the customer. Out loud. This alone closes most of leak 1.

TECH SAYS

Word for word.

"Before I print this, I want to make sure I got everything right. Today I did the following work. I [item one]. I [item two]. I [item three]. The total is [dollar amount]. Did I miss anything? Is that what you were expecting?"

Script 2. Quote follow-up call.

Use this 24 hours after sending a quote. Office or scheduler makes the call. Closes most of leak 3.

OFFICE SAYS

Word for word.

"Hi [name], this is [office name] from [shop name]. We sent you a quote yesterday for [the work]. I just want to make sure you got it. Do you have any questions on it? Is there anything we can change to make it work for you? When would you like to get on the schedule?"

PART 4 / CONTINUED

More scripts.

Script 3. Discount block.

Tech uses this when a customer pushes for a discount. Closes most of leak 6.

TECH SAYS**Word for word.**

"I hear you. The price is the price. I do not have the authority to discount this. What I can do is call my office and see if we can do anything. Want me to make the call?"
Then the tech calls the office. The office says no most of the time. The job still closes 80% of the time.

Script 4. Member retention.

Two short calls keep most members. Closes most of leak 7. Use the first one 30 days before renewal. Use the second one the same day a card fails.

OFFICE SAYS / RENEWAL CALL**30 days before renewal.**

"Hi [name], this is [office name] from [shop name]. Your maintenance plan renews on [date]. I am just calling to confirm the card on file still works and to remind you what is included. You get [item], [item], and [item]. Plus priority scheduling. Anything you need before the renewal?"

OFFICE SAYS / FAILED CARD CALL**Same day the card fails. Phone call, not email.**

"Hi [name], this is [office name] from [shop name]. The card we have on file for your plan was declined today. I want to make sure you do not lose your member benefits. Do you have a different card you want to use?"

PART 5

The 30-day plan.

You found the leaks. You have the scripts. Now you install them. One week at a time. Most owners stop the bleed inside 30 days.

Week 1: Find. You do the audit and count every leak.

Week 2: Plug. You install the easy fixes.

Week 3: Bill back. You start recovering money the same week.

Week 4: Lock in. You make the fixes permanent.

ONE RULE

Do not skip weeks.

Every owner who skips Week 1 to get to Week 3 stops the bleed for two weeks and then it starts again. The audit is the spine. The audit is what makes every other week work. Do the audit.

WEEK 1 / DAYS 1 TO 7

Find.

Goal. Run the audit. Count every leak. Do not fix anything yet.

DAY 1 MONDAY	Read this whole guide. Print the audit checklist on page 12 and 13.
DAY 2 TUESDAY	Run the audit for Leak 1 and Leak 2. Pull invoices. Pull call logs. Count.
DAY 3 WEDNESDAY	Run the audit for Leak 3 and Leak 4. Pull quotes. Check your last price increase date.
DAY 4 THURSDAY	Run the audit for Leak 5. Count parts on one truck. Compare to system.
DAY 5 FRIDAY	Run the audit for Leak 6 and Leak 7. Pull discount log. Pull member list.
DAY 6-7 WEEKEND	Add up your total leak number. Write it down. Show your spouse. Sleep on it.

WEEK 2 / DAYS 8 TO 14

Plug.

Goal. Install the easy fixes. Three scripts go live. Phone gets covered.

DAY 8 MONDAY	Print Script 1. Walk every tech through it. They use it on every call starting today.
DAY 9 TUESDAY	Set the rule. No discounts over \$50 without a call to the office. Tell every tech.
DAY 10 WEDNESDAY	Get one person on the phone full time during business hours. Spouse, scheduler, or VA.
DAY 11 THURSDAY	Set a 5% price increase. Effective first of next month. Update the invoice template.
DAY 12 FRIDAY	Print Script 2. Office uses it on every quote 24 hours after it goes out.
DAY 13-14 WEEKEND	Read every invoice that went out this week. Check for missed line items. Note patterns.

WEEK 3 / DAYS 15 TO 21

Bill back.

Goal. Money starts hitting the bank. Truck stock and members get locked down.

DAY 15 MONDAY	Run the truck restock process. Every tech reports what they used last week. Office reconciles.
DAY 16 TUESDAY	Pull list of every member with a renewal in the next 60 days. Office starts Script 4 calls.
DAY 17 WEDNESDAY	Tag top 20 truck parts with min-max levels. Order tags or barcodes if needed.
DAY 18 THURSDAY	Office runs the failed card call from Script 4 on any failed card from last 90 days.
DAY 19 FRIDAY	Spot check 5 random invoices from this week. Did Script 1 work? Count the line items.
DAY 20-21 WEEKEND	Add up money recovered this week. Write it down. Compare to last week.

WEEK 4 / DAYS 22 TO 30

Lock in.

Goal. Make every fix permanent. Set the rules. Walk away on day 31.

DAY 22 MONDAY	Write down every rule you set in weeks 2 and 3. One page. Print it. Post it in the shop.
DAY 23 TUESDAY	Schedule a 15-minute Monday morning meeting every week. Review last week's invoices and calls.
DAY 24 WEDNESDAY	Put the price increase live. Update every quote going out from now on.
DAY 25 THURSDAY	Run all 7 audits one more time. Score yourself. Note which leaks are now closed.
DAY 26-27 FRI-SAT	Have the team sign off on each rule. Walk every person through what you changed and why.
DAY 28-30 FINAL DAYS	Track recovered money for one more week. Add it up. That number is your new floor.

PART 6

Two ways forward.

You can do everything in this guide on your own. Many owners have. It works. It also takes time. Here is the honest side-by-side.

	DO IT YOURSELF	DONE WITH EAC
Time to stop the bleed	30 days if you do every step	30 days. Same plan.
Cost	Free. This guide.	\$1,000 up front. \$3,000 on day 31 only if you have 10 hours back. 14-day refund window.
Risk	You stop halfway. Most owners do.	Low. We hold you to the schedule.
The audit	You run it alone. You score it alone.	We run it with you. We score it for you.
Weekly live session	None.	60 minutes a week with John and other owners.
Direct access	None.	Text John direct for the full 30 days.
Voice-Print of your business	Not included.	Built day one. Your team sounds like you on the phone.
Founders 50 rate locked	Not available.	Lifetime rate for the first 50 members.

WHO DIY IS RIGHT FOR. You like to do it yourself. You have one hour a day for 30 days. You will not stop when it gets boring.

WHO EAC IS RIGHT FOR. You have tried before and stopped. You want someone watching the work. You want the money back this quarter, not next year.

ONE LAST THING

Every dollar you stop losing is a dollar you already earned.

You worked for that money. Your team worked for that money. It belongs in your bank, not on the floor.

Do the audit. Plug the leaks. Take the money home.

Do it on your own with this guide. Or do it with us. Either way, do it.

READY TO TALK?

Book a 30-minute call.

We will run your audit together. No pitch. No pressure. If Win Back Your Week is a fit, we will say so. If not, we will tell you that too.

winbackyourweek.com

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