



PLANNIT FIELD REPORT

THE HIDDEN MONEY LEAK REPORT

Three systems problems that quietly drain trade businesses—and how to fix them in 30 days.

For owners of HVAC, plumbing, electrical, roofing, landscaping and other field-service businesses.

A background image showing a close-up of water splashing, with many small droplets suspended in the air and larger droplets on the surface. The water is clear and bright, set against a blurred background.

The problem isn't your work.

If you're reading this, you're not running a bad business. You're running a busy one. And that, more than anything else, is where the leaks start.

Every trade business owner we work with started roughly the same way: a phone, a truck, a good reputation, and a calendar that filled up faster than anyone could organize it. For a while, that formula works beautifully. The work is solid. The clients are happy. The money comes in.

Then, somewhere between three and fifteen employees, something quietly shifts. Revenue grows, but profit doesn't grow at the same rate. The team is busier, but also more exhausted. You're putting in sixty-hour weeks and still feel behind. The bank account says "fine," but your gut says "something is leaking."

That something is almost never the work itself. Tradespeople are exceptional at their craft. **The leaks live in the systems around the work**—the quoting, the follow-ups, the scheduling, the invoicing, the close-out.

This guide covers the three most common system leaks we see inside trade businesses. None of them feels dramatic on any given day. That's exactly why they're dangerous: they don't fail loudly, they bleed you out in small cuts.

How to use this guide

Read it in fifteen minutes. Pick one leak.
Commit to the fix for thirty days.

Owners who tighten just one of the three typically recover 10–15% of lost revenue within a single quarter.



Leak #1

Missed follow-ups

Why it happens

A lead calls or texts in. You're on a roof, under a sink, in an attic. You see the notification. You plan to call back. Then the next thing happens. Then the day ends. Then two days pass. Then the lead books the competitor.

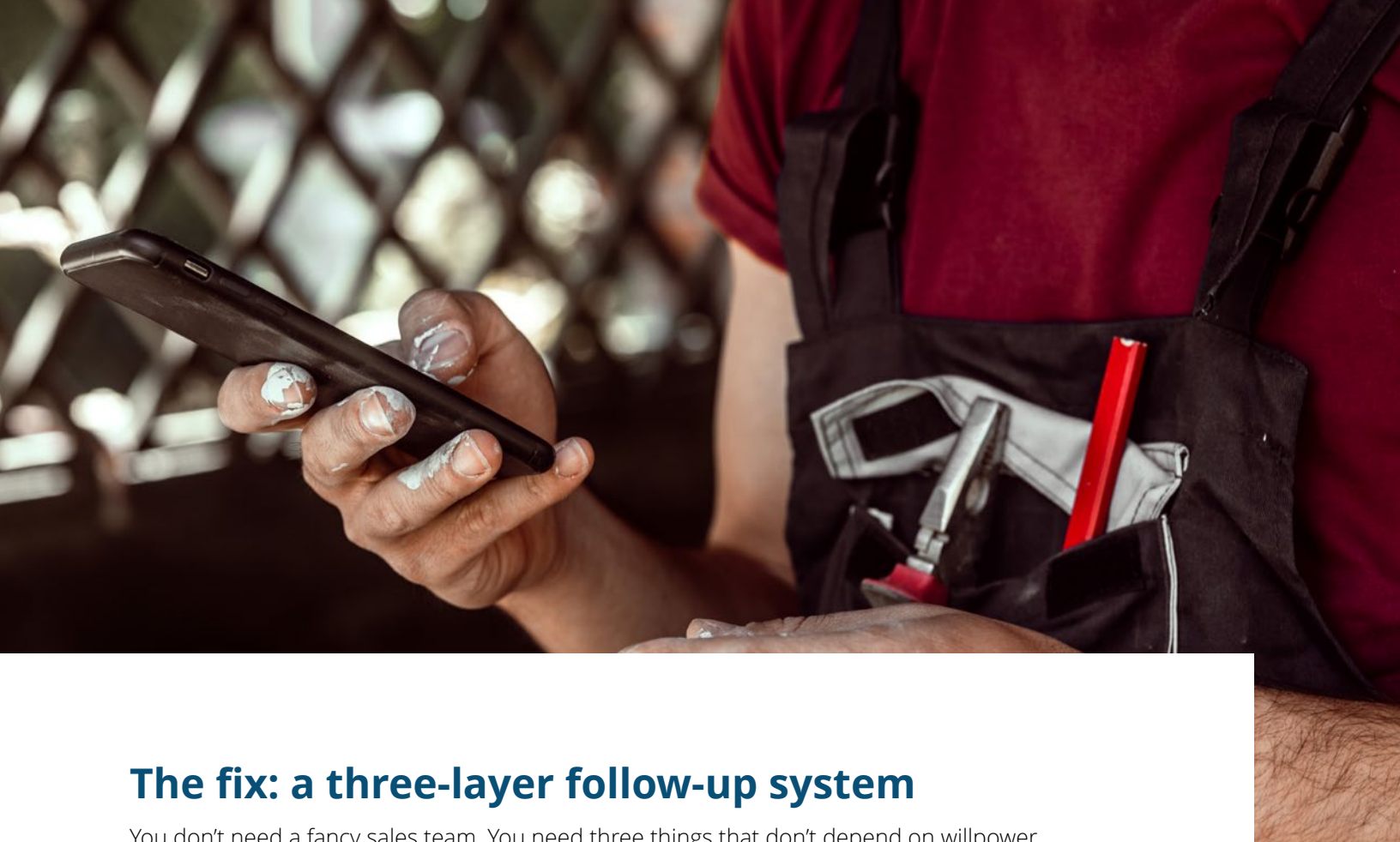
This isn't a discipline problem—it's a design problem. If the act of following up depends on you remembering, under pressure, on a schedule you don't control, it will fail. Not sometimes. Most of the time.

What it actually costs

Let's run the math the way most owners never do:

- Average residential service ticket: \$400–\$900 (varies by trade).
- Average bid value for medium-ticket work: \$2,500–\$15,000.
- Lead-to-booked conversion when contact happens within 5 minutes: around 45%.
- Lead-to-booked conversion when contact happens after 24 hours: under 10%.

If you receive 40 inbound leads per month and delay or drop 30% of them, you're not losing 12 calls—you're losing the conversion-rate difference on those 12 calls. That's usually \$8,000–\$25,000 in monthly revenue. Annualized, that's six figures walking out of a mid-sized business.



The fix: a three-layer follow-up system

You don't need a fancy sales team. You need three things that don't depend on willpower.

1 Capture every lead at one door, not five.

Phone, web form, Facebook DM, referral card—every lead lands in a single place: a shared inbox, or better yet: a simple CRM. What matters is that no lead lives in someone's head or personal text messages.

2 Speed on the first touch.

The single highest-leverage rule in field service is this: a response within five minutes—even a holding message like “Got it, can I call you at 2pm?” That one text can double your booking rate. Make it human, but automated.

3 A cadence for warm-but-not-booked leads.

A quote sent is not a quote followed up. Use a simple rhythm: Day 1 (send), Day 3 (check-in), Day 7 (value-add—a photo of a similar job, a short tip), Day 14 (final), Day 45 (seasonal re-open). Most trades win an extra 20–30% of quotes just by doing this.

30-day checklist—Leak #1

- Every lead lands in one central place within 60 seconds of arrival.
- First response happens within 5 business minutes.
- Every open quote has a next-follow-up date attached.
- Follow-up reminders are automated, not memory-based.
- You can answer “how many open leads do we have right now?” in under 30 seconds.



Leak #2

Unbilled work

Why it happens

Your technician drives out, does the job, the customer is happy, hands are shaken, tech leaves. Two things then need to happen: the work order has to be closed, and an invoice has to go out. If either of those steps depends on a piece of paper in a truck, a photo on a phone, or someone's memory at the end of a long day, it will slip. Not every time. Often enough to matter.

The owner who told us he lost \$80,000 in a single year wasn't careless. He was running 14 trucks and 22 active projects. His techs would note the completed work on their phones with the intention of sending it to the office. Half the notes made it. The other half died in a group thread or a camera roll.

What it actually costs

Third-party audits across HVAC, plumbing and electrical consistently find that 3–8% of completed work is either never invoiced, under-invoiced, or invoiced so late it gets disputed or written off. On a \$1.2M shop, that's \$36,000–\$96,000 per year straight off the bottom line. No margin pressure hurts more than this one—because the money has already been earned.



The fix: close the loop at the job, not at the desk

The rule: *no job is done until it is billed*. That sounds aggressive. In practice it just means moving the invoice step forward to where the work actually ends.

1 Invoice (or pre-invoice) on-site.

The most reliable fix we've ever seen: the tech hits "complete" on a mobile device in the driveway before pulling away, which auto-generates the invoice. Even if collection happens later, the record exists. No paper. No forgetting.

2 Separate job closed, invoice sent, and invoice paid.

These are three different states, not one. The most expensive state is "job done, invoice not sent." It needs its own visible queue. If you can't see that queue at a glance, you're losing money in it.

3 Put change orders in writing—always.

"We added the extra circuit while we were in there" is the most expensive sentence in the trades. Every scope change—even a 15-minute add—needs quick written acknowledgement before work is done. Trades that start doing this recover 2–5% of revenue immediately.

30-day checklist—Leak #2

- Every completed job produces an invoice within 24 hours.
- Change orders are documented in writing before work begins.
- Someone owns the "open invoice" queue by name.
- You can see, right now, the dollar value of work done but not yet billed.



Leak #3

Wasted drive time

Why it happens

It looks like this: two of your techs are within four kilometres of each other on Tuesday and don't know it. Same neighbourhood Wednesday—different techs, different jobs, nobody batched. A callback on the north end happens on a day nobody is routed there. The problem isn't that your team is lazy. The problem is that the schedule was built one job at a time, not as a whole.

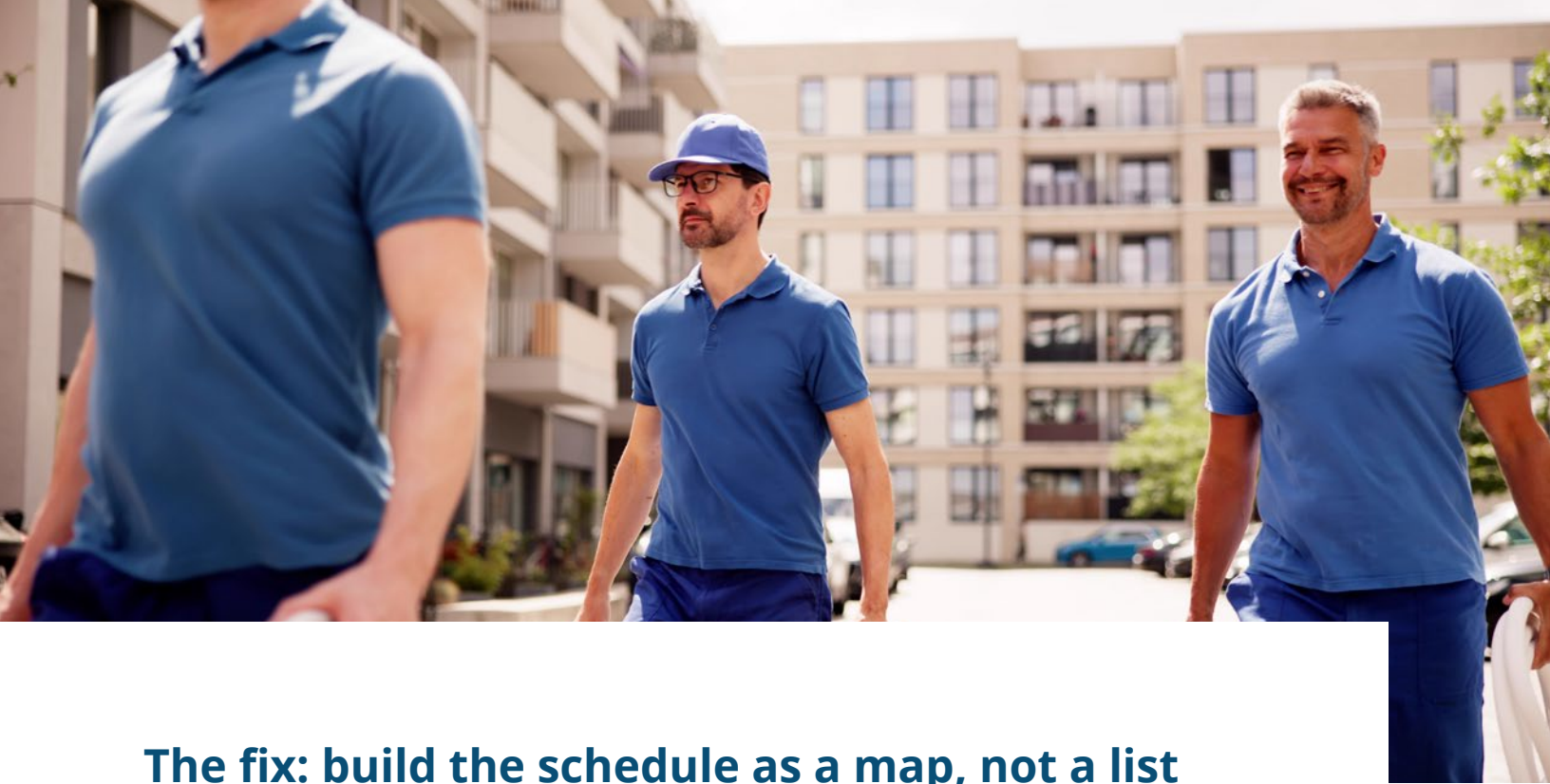
In a single-truck business this barely matters. As soon as you're running three or more trucks, the invisible cost stacks up fast. And because it never shows up as a single big loss, it never triggers a conversation.

What it actually costs

Let's be concrete. A technician driving an extra 45 minutes across a city costs you:

- Fuel: \$8-\$15
- Labour: \$30-\$60 (fully loaded)
- Opportunity cost: one job you couldn't fit in—easily \$200-\$500
- Wear & tear: roughly \$0.20/km in long-term vehicle cost

One avoidable trip per tech per day, across a 5-truck operation, 5 days a week, works out to roughly \$35,000-\$60,000 per year—before you count the callbacks and same-day opportunities you had to turn down because the map was chaos.



The fix: build the schedule as a map, not a list

1 Geocode every job.

This sounds technical; it isn't. It means that every address is visible as a pin on a shared map, not just a line in a list. Any modern dispatch tool does this automatically. If your schedule still lives on a whiteboard or in a spreadsheet, this is the single biggest upgrade you can make.

2 Batch by geography before urgency.

Unless something is a true emergency, you win by clustering: all the north-end work on Tuesday, the east side Wednesday. Tell clients this when booking—most will happily wait two days for a firmer time window.

3 Build overflow capacity for emergencies.

Reserve 60–90 minutes per tech per day as flex capacity for same-day work. This keeps emergencies from blowing up the rest of the schedule and double-routing your team.

4 Review routes weekly.

Every Friday, compare the week's actual driven map to what it could have been. You won't do this forever, but four weeks of it retrains how the schedule gets built in the first place.

30-day checklist—Leak #3

- Every job has a geocoded address visible on a shared map.
- Jobs are batched by geography, not just by date booked.
- Each tech has defined daily flex capacity for emergencies.
- Drive time is a tracked metric, not a mystery.
- You can answer “why are two trucks in the same zip code today?” before it happens, not after.

The one underlying principle

All three leaks share the same root cause. The lead, the quote, the job, the invoice, the route, the conversation—they all live in different places. A phone. A piece of paper. Someone's memory. A group text. A spreadsheet on a laptop. As long as information is scattered, things will fall through the cracks, and the bigger you grow, the wider those cracks get.

The fix isn't more hustle. It's pulling everything into a single operating picture where the lead, the quote, the scheduled job, the technician's completion note, the invoice, and the payment form one connected chain—so nothing can go missing between steps.

You can maybe build this with sticky notes, spreadsheets and discipline up to about four employees. Past that, you'll want a system that does it for you.

Where Plannit fits

Plannit is built for trade and field-service businesses that have outgrown the paper-and-phone stage but aren't ready for heavyweight enterprise software. We bring leads, quoting, scheduling, dispatch, invoicing and follow-ups into one place—so the three leaks in this guide stop being leaks.

We don't think software alone fixes a business. Operators fix businesses. But the right tool removes the friction that makes good operators quietly lose money.

Next steps

Book a 20-minute walkthrough at plannit.com — we'll map your current workflow and show you exactly where the leaks are.

plannit.com/en/entreprise

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