



YOUR BLUE COLLAR BLUEPRINT™

FIND THE MONEY™ ASSESSMENT REPORT

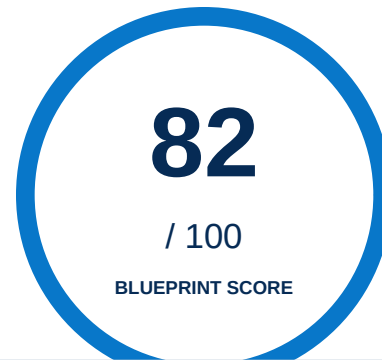
PREPARED FOR	D. C.
COMPANY	Air Conditioning Company
PRIMARY TRADE	HVAC
PRIMARY MARKET	Northeast Florida
ANNUAL REVENUE	\$5,900,000

ASSESS. FIND THE MONEY. BUILD THE PLAN. EXECUTE. MEASURE. COACH. IMPROVE.



YOUR BLUEPRINT SCORE

D., here's where your business deserves attention first.



NEEDS ATTENTION

Your Blueprint Score combines financial health, operating performance and leadership execution. It identifies where focused management attention can create the greatest improvement.



YOUR SCORES BY CATEGORY

Each category highlights a different part of the operating system. The larger number is your score; /100 is the scale.

FINANCIAL HEALTH	91 / 100	STRONG	Gross profit, net profit, cash reserves and receivables.
OPERATIONS	87 / 100	STRONG	Call center, service, sales, capacity, margins and field execution.
LEADERSHIP	67 / 100	PRIORITY	Accountability, coaching, people systems, culture and owner independence.

How to read the scores: 85-100 = Strong; 70-84 = Needs Attention; below 70 = Priority.



FIND THE MONEY™

WHERE IS THE REVENUE HIDING?

These estimates identify annual revenue associated with closing specific performance gaps using the data you provided.

LARGEST MEASURABLE OPPORTUNITY		\$301,642
Replacement Conversion		Current: 51% Target: 55%
01	Replacement Conversion Replacement / Sales Current: 51% Target: 55%	\$301,642
02	Average Service Ticket Service Current: \$379 Target: \$450	\$149,100
03	Service Call Conversion Service Current: 71% Target: 85%	\$111,426
04	Inbound Call Booking Call Center Current: 85% Target: 90%	\$32,291

Important: Opportunities may overlap and should not be blindly summed. Estimates represent potential revenue, not profit.



YOUR TOP 3 PRIORITIES

Priority Score = 50% Financial Impact + 25% Performance Gap + 25% 90-Day Actionability.

PRIORITY #1		Replacement Conversion		74 / 100
EST. ANNUAL REVENUE OPPORTUNITY		Financial Impact	Performance Gap	90-Day Actionability
\$301,642		100 / 100	7 / 100	90 / 100
90-DAY FOCUS		Sales process coaching, financing, option presentation, lead follow-up and weekly replacement-conversion review.		
PRIORITY #2		Average Service Ticket		52 / 100
EST. ANNUAL REVENUE OPPORTUNITY		Financial Impact	Performance Gap	90-Day Actionability
\$149,100		49 / 100	16 / 100	95 / 100
90-DAY FOCUS		Technician coaching, pricing discipline, option presentation, ride-alongs and weekly average-ticket review.		
PRIORITY #3		Service Call Conversion		45 / 100
EST. ANNUAL REVENUE OPPORTUNITY		Financial Impact	Performance Gap	90-Day Actionability
\$111,426		37 / 100	16 / 100	90 / 100
90-DAY FOCUS		Technician communication coaching, diagnosis, options presentation, ride-alongs and weekly conversion review.		



KPI SCORECARD

Actual performance compared with Blue Collar Blueprint targets.

FINANCIAL HEALTH

KPI	ACTUAL	TARGET	SCORE	STATUS
Gross Profit %	48%	50%	96	Strong
Net Profit %	10%	15%	67	Priority
Cash on Hand	12 weeks	8 weeks	100	Strong
A/R > 60 Days %	2%	5%	100	Strong

OPERATIONS

KPI	ACTUAL	TARGET	SCORE	STATUS
Inbound Call Booking %	85%	90%	94	Strong
Service Call Conversion %	71%	85%	84	Needs Attention
Average Service Ticket	\$379	\$450	84	Needs Attention
Tech Revenue / Day	\$600	\$1,500	40	Priority
Replacement Lead Conversion %	51%	55%	93	Strong
Average Replacement Ticket	\$12,163	\$14,000	87	Strong
Maintenance Agreement Conversion %	32%	40%	80	Needs Attention
Callback %	3%	3%	100	Strong
On-Time Arrival %	90%	90%	100	Strong
Install Gross Margin %	45%	48%	94	Strong
Service Gross Margin %	68.5%	65%	100	Strong



LEADERSHIP & PEOPLE ASSESSMENT

Leadership practices are scored against a Blueprint target of 5 / 5. Low scores point to areas where stronger management systems and coaching rhythms are needed.

AREA	LEADERSHIP PRACTICE	CURRENT	SCORE
Leadership	Clear organizational chart and accountability	3 / 5	60
Leadership	Managers know the KPIs they own	5 / 5	100
Leadership	Managers coach employees weekly	5 / 5	100
People	Written role scorecards and expectations	2 / 5	40
People	Consistent recruiting and hiring process	3 / 5	60
People	Documented employee onboarding	1 / 5	20
Performance	Regular technician performance coaching	4 / 5	80
Performance	Underperformance addressed consistently	5 / 5	100
Culture	Core values used in hiring, coaching and recognition	3 / 5	60
Culture	Employees understand connection to company goals	4 / 5	80
Meetings	Leadership meetings produce commitments	1 / 5	20
Succession	Business operates effectively when owner is away	4 / 5	80



YOUR 90-DAY BLUEPRINT

The goal is not to fix everything at once. Focus management attention on the few priorities most likely to improve measurable business results.

PRIORITY 1

Replacement Conversion

Sales process coaching, financing, option presentation, lead follow-up and weekly replacement-conversion review.

PRIORITY 2

Average Service Ticket

Technician coaching, pricing discipline, option presentation, ride-alongs and weekly average-ticket review.

PRIORITY 3

Service Call Conversion

Technician communication coaching, diagnosis, options presentation, ride-alongs and weekly conversion review.

WEEKLY EXECUTION RHYTHM

- 1 Review the KPI scoreboard and Top 3 priorities.
- 2 Identify blockers and assign clear ownership.
- 3 Coach managers and frontline employees around the behaviors driving the KPI.
- 4 Document commitments, deadlines and measurable next actions.
- 5 Review outcomes weekly and adjust based on evidence.



READY TO FIND THE MONEY?

Turn Your Assessment Into a 90-Day Growth Plan

A Financial Opportunity Review helps validate the opportunities in this report, select the right Top 3 priorities and convert them into a practical execution plan with measurable weekly accountability.

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YOUR BLUE COLLAR BLUEPRINT™

Building stronger, more profitable and sustainable home-service businesses.