

OPERATIONS ASSESSMENT

Northside Mechanical

Current state, gaps, and a sequenced roadmap

A residential and light commercial heating, ventilation and air conditioning (HVAC) contractor in Gwinnett County, Georgia. Fourteen people, about \$2.4 million in annual revenue, and an owner who is still the system.

13 / 40

Operations score across eight areas

3.4 days

Average time from inquiry to quote

~\$20k

Quotable work per month that never gets quoted

What this assessment found

Northside Mechanical is a healthy business with a growth problem that looks like a staffing problem. The owner, Dan, believes he needs a second office person. What he actually has is roughly 45 inquiries a month arriving through four channels, with about a third of them never turning into a written quote because they land on his personal phone between service calls. The crews are busy, the books are clean, and the front door is leaking.

Nothing here requires a new hire. It requires one intake path, one place every open quote lives, automated follow-up that does not depend on anyone remembering, and a screen Dan can read on Monday morning. Those four things are the roadmap. In the order below, they pay for themselves inside the first quarter.

The headline number. About 13 inquiries a month go unquoted. At the company's own 41 percent close rate and \$3,800 average quoted job, that is roughly \$20,000 a month of work the business is already being asked for and not pursuing. Recapturing a quarter of it is \$5,000 a month, before any new marketing.

Scorecard

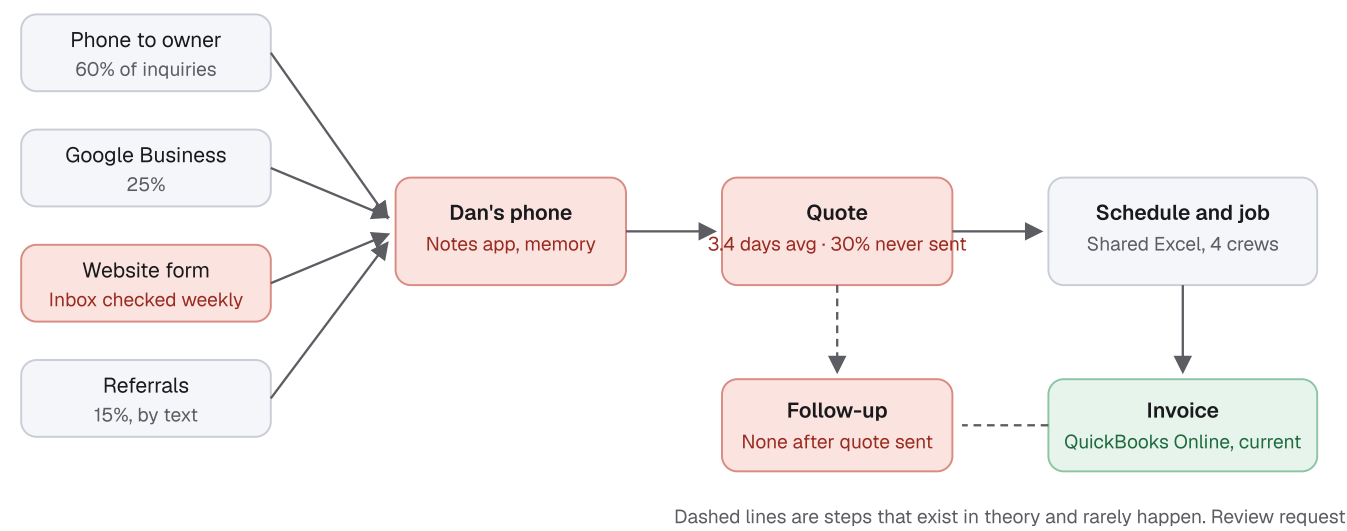
Each area is scored 1 to 5 against what a business this size should have in place. Scores come from the discovery questionnaire, a two-hour working session with Dan and the office manager, and a review of the last 90 days of inquiries, quotes and invoices.

Repeatable lead sources		2 / 5
Response time to inquiries		1 / 5
Visibility of open quotes and jobs		1 / 5
Website that converts		2 / 5
Customer data in one system		1 / 5
Revenue visibility by service and channel		3 / 5
Documented core processes		2 / 5
Tools that share data		1 / 5
Total		13 / 40

The strongest area is the books: QuickBooks Online is current and the office manager reconciles weekly. Everything upstream of an invoice is where the gaps are.

How work moves through the business today

This is the current-state map, drawn from what actually happens rather than what is supposed to happen. Red steps are where work is lost or delayed.



What the 90-day records show

MEASURE	OBSERVED	WHAT IT MEANS
Inquiries per month, all channels	45	Demand is not the problem.
Inquiries with a written quote	31 (69%)	About 13 a month are lost before a price is ever given.
Average inquiry to quote	3.4 days	Competitors in the area quote same day or next day.
Close rate on quotes sent	41%	Strong. The sales problem is upstream of the quote.
Average quoted job	\$3,800	Mix of service, repair and replacement installs.
Quotes with any follow-up	0	Every unanswered quote is assumed lost.
Google reviews in the last 12 months	6	About 300 jobs completed. Nobody asks.
Systems holding customer data	5	Phone, Notes app, Excel, Gmail, QuickBooks. None connected.

Gap register

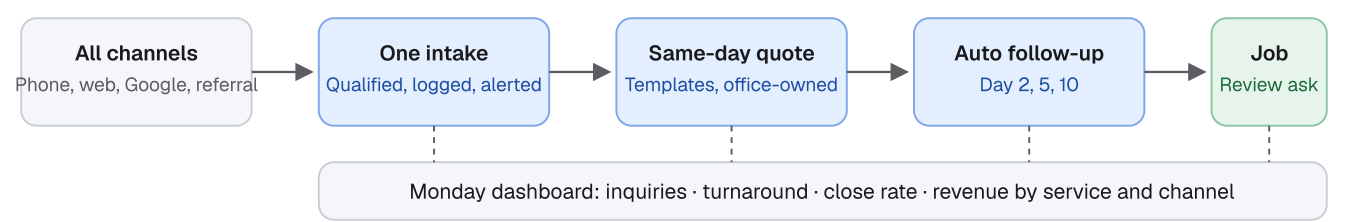
Each gap is stated as the difference between how the business runs and how it needs to run to hit Dan's stated goal: \$4 million in revenue in three years without adding office staff. Cost of inaction is a conservative monthly estimate based on the company's own numbers.

#	GAP	EVIDENCE	COST OF INACTION	PRIORITY
G1	No single intake path. Inquiries arrive in four places and are triaged from memory.	Website form inbox last opened 9 days before the session, with 4 unanswered requests inside it.	\$5,000+ / mo	Now
G2	No record of open quotes. Nobody can say what is pending without asking Dan.	Office manager rebuilt the pending list from text messages for the session. It took 40 minutes and missed two.	Included in G1	Now
G3	Quote turnaround of 3.4 days. Replacement installs are shopped to two or three contractors; the first clear quote usually wins.	Dan writes quotes at night from Notes app entries. Two of the last 20 install quotes referenced the wrong address.	\$3,000 / mo	Now
G4	No follow-up after a quote.	Zero follow-ups in 90 days. Industry norm is three touches over ten days.	\$2,500 / mo	Next
G5	Website does not ask qualifying questions or offer a booking.	Single "contact us" form with name, phone, message. No service type, no address, no urgency, no preferred time.	Drives G1 and G3	Next
G6	No review engine. Six reviews in a year against roughly 300 jobs.	Google Business profile ranks fourth locally behind three competitors with 80 to 200 reviews each.	Lead volume, unmeasured	Next
G7	No management view. Dan learns the month's numbers when the accountant sends them.	Revenue by service line and by channel is not tracked anywhere.	Decision quality	Then
G8	Nothing is written down. Intake, quoting and scheduling live in Dan's head and the office manager's habits.	Both said a new office hire would take "a few months" to be useful. With documented processes, that is weeks.	Blocks hiring	Then

What is not a gap. Bookkeeping, crew quality, pricing and margins are in good shape and this roadmap leaves them alone.

Target state

Twelve months from now, every inquiry from every channel lands in one system within a minute of arriving, with the service type, address and urgency already captured. The office manager, not Dan, owns the first response, and a quote for standard work goes out the same day from a template. Anyone in the office can see every open quote and where it stands. Follow-up happens automatically on days two, five and ten unless someone marks the quote won or lost. Every completed job triggers a review request. Dan opens one screen on Monday and sees inquiries, quote turnaround, close rate and revenue by service line for the month, and spends his evenings not writing quotes.



Targets at 90 days and at 12 months

MEASURE	TODAY	90 DAYS	12 MONTHS
Inquiries with a written quote	69%	90%	95%
Average inquiry to quote	3.4 days	1 day	Same day
Quotes with follow-up	0%	100%	100%
Google reviews added per month	0.5	6	10+
Hours per week Dan spends on quotes and intake	~12	4	1
Systems holding customer data	5	1 (plus QuickBooks)	1 (plus QuickBooks)

On tools

The roadmap is written around the outcomes above, not around any particular product. A field-service platform will be selected in week two from a shortlist of three, scored against this business's actual workflow and budget. I take no referral fees from any vendor, and every account is opened in Northside Mechanical's name. If you leave, you keep everything.

Sequenced roadmap

Ordered by payback, not by ambition. Each phase is usable on its own. Nothing in a later phase is required for an earlier one to pay off.

Phase 1 · Weeks 1 to 4 · Stop the leak

WORK	RESULT	CLOSES	PAYBACK
Select and set up the field-service platform. Import customers from QuickBooks, Excel and Gmail.	One system of record for every customer, inquiry, quote and job.	G1, G2	Month 1
Rebuild the website quote request with qualifying questions, routed into the platform with a text alert to the office.	Web inquiries logged in under a minute, never in a forgotten inbox.	G1, G5	Month 1
Office-owned intake script and three quote templates (service, repair, replacement).	Standard quotes go out same day without Dan.	G3	Month 1

Phase 2 · Weeks 5 to 8 · Make follow-up automatic

WORK	RESULT	CLOSES	PAYBACK
Automated quote follow-up sequence on days 2, 5 and 10 by text and email, stopped when marked won or lost.	Every quote gets three touches. Recovers an estimated 2 to 3 jobs a month.	G4	Month 2
Review request on invoice paid, with a direct Google link.	From 6 reviews a year to 6 a month. Local ranking improves within a quarter.	G6	Month 3 to 4
Lead source captured on every inquiry.	Know which channel pays before spending on any of them.	G7	Month 2

Phase 3 · Weeks 9 to 12 · See the business

WORK	RESULT	CLOSES	PAYBACK
Monday dashboard: inquiries, quote turnaround, close rate, revenue by service line and channel.	Ten-minute weekly read instead of a monthly surprise.	G7	Month 3
Written standard operating procedures (SOPs) for intake, quoting and scheduling. Two training sessions with the office.	A new office hire is productive in two weeks, not a few months.	G8	At next hire

Investment and payback

ITEM	AMOUNT
Operations Snapshot, the entry point: one call, four-page version of this report, one week. Credited toward the Assessment.	\$450
Assessment (this document)	\$2,500
Credit toward Install if started within 30 days	(\$2,500)
Install, Phases 1 to 3, fixed fee	\$8,500
Total to a working system	\$8,500
Software, paid by Northside directly, estimated	\$150 to \$300 / mo
Maintain, optional, after Install	\$750 / mo
Managed, optional, I run it and keep building	From \$5,000 / mo

PAYBACK, CONSERVATIVE CASE

Recapturing 3 of the 13 unquoted inquiries a month at the existing 41 percent close rate is 1.2 additional jobs. Add 2 jobs a month from follow-up on quotes that are already written. That is roughly 3 jobs a month at \$3,800, or \$11,400 in revenue. At Northside's 35 percent gross margin, about **\$4,000 a month in contribution.**

About 2 months

to recover the \$8,500 Install fee

This ignores review-driven lead growth, Dan's recovered evenings, and the second office hire that does not get made. If the recapture rate is half what is modeled, payback is four months.

Months 4 to 6 · Grow on purpose (optional, under Maintain or Managed)

A lead engine that watches county permit filings and property age to surface replacement-install prospects weekly. A maintenance-plan offer wired into the invoice step. A hiring process document for the second office role, written when the numbers say it is time.

What I need from you

- Dan: two hours in week one for platform selection, one hour a week after that for decisions.
- Office manager: half a day in week two for data import review, then the two training sessions in Phase 3.
- Admin access to the website, Google Business profile, QuickBooks Online (read only) and Gmail for routing.
- Yes or no on each roadmap item. Nothing gets built that you did not approve.

The guarantee

If the assessment had shown the roadmap would not pay for itself within a year, this document would say so and recommend you stop. If any Phase 1 item is not working as described by the end of week four, I fix it at no charge or refund that portion of the Install fee.

Next step

Reply with a start date. Phase 1 begins the following Monday and the first inquiry is logged in the new system by the end of that week.

ABOUT

Who wrote this



Patrick Barnsley

A decade across data, information technology (IT), sales, marketing and operations. I started on the sales side, talking with thousands of companies, then moved into delivering enterprise technology programs across defense, nuclear, pharmaceutical and semiconductor work.

The scale is different for an owner-led business. The problems are the same: work comes in unevenly, nothing is written down, and the owner is the system. I find what is slowing you down, fix it in the right order, and leave you with systems your team can actually run.

Project Management Professional (PMP) · PMI Agile Certified Practitioner (PMI-ACP) · Lean Six Sigma Green Belt · Information Technology Infrastructure Library (ITIL) 4

Vendor-agnostic

No referral commissions. The tools I pick are the ones that fit your business.

You own it

Every account, automation and file lives in your name from day one.

Build, not advise

The roadmap is the start. I install it, train your team, and stay on only if you want me to.

Want to know what your version of this report would say?

Start with the two-minute diagnostic. If you want a smaller first step, the \$450 Operations Snapshot gives you the scorecard and your top three gaps in one week, and counts toward the full assessment.

patrickbarnsley@gmail.com · (858) 386-9742 · [linkedin.com/in/patrickbarnsley](https://www.linkedin.com/in/patrickbarnsley) · Metro Atlanta, remote anywhere