CALCULATOR

APRIL 7, 2026

DIAGNOSTIC FEE CALCULATOR (SHEET) + PHONE SCRIPT MINICARD

Calculator + script kit for owner-operators to set a defensible diagnostic/service-call fee using loaded rate, windshield time, first-hour productivity, and close rate. Includes a phone script mini-card, invoice line-item structure, and rollout metrics.

FROM EPISODE

STOP WAIVING THE SERVICE CALL: SET, EXPLAIN, AND ENFORCE A DIAGNOSTIC FEE

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Set, explain, and enforce a diagnostic/service-call fee without guessing. Plug in your shop's numbers to get two defensible fee targets (non-convert and pooled/crediting), then hand the CSR mini-card to your phones team. Built for HVAC, plumbing, electrical, and similar residential service.

INPUT: [LOADED HOURLY RATE PER BILLABLE HOUR (L)]

Your true, fully loaded $/billable hour for service work. Include wage, benefits/burden, vehicle, tools, uniforms, insurance, software, and overhead allocated to service, divided by expected billable hours. If you don't track it yet, use your internal labor-rate method and enter that figure here. Valid range: any positive dollar value. Default: [ENTER YOUR RATE].

INPUT: [AVERAGE WINDSHIELD TIME — MINUTES (W)]

Average one-way drive time from the previous stop (or shop) to the diagnostic visit. Pull from GPS/CRM over the last 30 days; exclude outliers if needed. Use a realistic average your dispatch sees most days. Units: minutes. Valid range: 0–120. Default: [30].

INPUT: [AVERAGE DIAGNOSTIC TIME ON SITE — MINUTES (D)]

Average on-site time to greet, diagnose, and build a same-day repair option (no repair time). Units: minutes. Valid range: 15–120. Default: [40].

INPUT: [FIRSTHOUR PRODUCTIVITY (P)]

Percent of the first hour that's actually productive billable time (setup/admin eats the rest). Enter as a decimal in the Sheet (e.g., 0.70 for 70%). Valid range: 0.30–1.00. Default: [0.70].

INPUT: [DIAGNOSTIC CLOSE RATE — SAMEDAY APPROVAL (C)]

Percent of diagnostic visits that approve a same-day repair. Enter as a decimal (e.g., 0.60). Valid range: 0.00–0.95 (use 0.95 cap for math safety). Default: [0.60].

OUTPUT: [COST BASIS — EFFECTIVE BILLABLE HOURS PER DIAGNOSTIC VISIT]

We translate minutes and first-hour drag into effective billable hours, then multiply by your loaded rate to get your cost per diagnostic visit. Use this as the base for both fee options. Formulas:

- Define minutes: `T = W + D`
- First hour minutes: `T1 = MIN(T, 60)`
- Beyond first hour: `T2 = MAX(T - 60, 0)`
- Effective billable hours: `H = (T1/60)/P + (T2/60)`
- Cost basis ($): `Cost = L * H`
  Note: The P adjustment only applies to the first 60 minutes to reflect real first-hour inefficiency. Keep P as a decimal in your sheet.

OUTPUT: [NONCONVERT BREAKEVEN FEE — F_NONCONVERT]

If a call does not convert to a repair, this fee covers your time at break-even. Round up to a clean price.

- Math: `F_nonconvert = CEILING( Cost , 10 )`
- Google Sheets formula (assuming: L=B3, W=B4, D=B5, P=B6):

```
=CEILING( $B$3 * ( (MIN($B$4+$B$5,60)/60)/$B$6 + MAX($B$4+$B$5-60,0)/60 ), 10 )
```

Tip: Use CEILING to round to the next $10 for a clean published fee.

OUTPUT: [POOLED BREAKEVEN IF CREDITING FEES — F_POOLED]

If you credit the diagnostic fee to same-day repairs (common policy), you only keep the fee on non-converts. Price so that non-converts, on average, cover all visits.

- Math: `F_pooled = CEILING( Cost / (1 - C) , 10 )`
- Google Sheets formula (same inputs plus C=B7):

```
=IF($B$7>=0.95,
"Close rate too high to credit 100% — consider feestands policy",
CEILING( ($B$3 * ( (MIN($B$4+$B$5,60)/60)/$B$6 + MAX($B$4+$B$5-60,0)/60 )) / (1 -
$B$7), 10 )
)
```

Note: If C→1, pooled math blows up. In that case, run a fee-stands policy or reduce the credit.

OUTPUT: [RECOMMENDED SEASONAL TARGETS — PUBLISH THIS]

Pick your policy and publish a clean number. Use a light capacity buffer in season.

- If you CREDIT the fee to same-day repairs:
  - In-season target: `F_publish = CEILING( MAX(F_nonconvert, F_pooled) * 1.10 , 10 )`
  - Off-season target: `F_publish = CEILING( MAX(F_nonconvert, F_pooled) * 1.00 , 10 )`
- If your FEE STANDS on every visit (members get a small loyalty credit):
  - In-season target: `F_publish = CEILING( MAX(F_nonconvert, Cost) * 1.10 , 10 )`
  - Off-season target: `F_publish = CEILING( MAX(F_nonconvert, Cost) * 1.00 , 10 )`
    Notes:
- 1.10 is a default buffer for peak capacity protection; adjust to taste.

- Keep the published price ending clean ($79/$89/$99 or rounded to $10s).

OUTPUT: [CSR BOOKING SCRIPT MINICARD]

Paste on a one-pager for CSRs. Replace bracketed fields from your sheet.

Script (fee credited to same-day repair):

- “We can get you taken care of. Our professional diagnostic visit is [F_publish]. That covers travel and a full licensed diagnosis. If you approve the repair today, we apply that [F_publish] to the work. Do you prefer a morning or afternoon window?”

Script (fee stands + member credit):

- “The visit is [F_publish]. It covers travel and a full licensed diagnosis. Members get a [MemberCredit] credit on today’s visit. Would morning or afternoon work better?”

Four quick objection beats:

1. Price-shopper (“Do you waive it?”)

- “We don’t waive the diagnostic. It protects same-day availability for customers ready to fix it now. If you approve today’s repair, we [apply it/credit members]. Morning or afternoon?”

2. Warranty (“Parts are under warranty, so the visit should be free.”)

- “Manufacturer parts coverage doesn’t include travel or diagnosis. Today’s [F_publish] covers our licensed diagnosis so we can confirm what the warranty covers. Want the 10–12 window?”

3. Landlord/Tenant (“I’m renting.”)

-

“No problem. The visit is [F_publish]. If your landlord is covering it, we can note them for billing, but we disclose the fee before dispatch. Would you like today or tomorrow?”

4. “My other guy waives it.”

- “Some shops fold that cost into repair pricing. We price it up front so you know exactly what the visit includes, and we [apply it with same-day approval/credit members]. I can hold a 2–4pm — take it?”

Handle-the-pause rule: State the fee once, then move straight to scheduling. Don’t fill the silence — let the customer decide.

OUTPUT: [INVOICE LINEITEM STRUCTURE — WHAT THE CUSTOMER SEES]

Keep it simple and transparent:

- Line 1: `Service/Diagnostic Visit — includes travel and professional diagnosis` … `[F_publish]`
- Line 2: `Repair — [Flat-rate task/code/description]` … `[Price]`
- Optional Line 3 (crediting policy): `Diagnostic credit applied to approved same-day repair` … `-[F_publish]`
- Optional Line 4 (members): `Member loyalty credit` … `-[MemberCredit]`
  Notes:
- Disclose the diagnostic fee before dispatch.
- Include travel within the diagnostic/service line (avoid a confusing separate “trip” add-on unless you clearly explain it).

OUTPUT: [POSTROLLOUT METRICS TO VALIDATE THE POLICY]

Track these weekly for 30–60 days after rollout:

- Fee acceptance rate = booked visits ÷ calls where fee was disclosed.
- Cancellations after fee disclosure = cancellations ÷ calls where fee was disclosed.
- Average ticket on diagnostic jobs = revenue ÷ closed diagnostic jobs.
  Where to pull: booking report (CSR/CRM), opportunity/close report, job revenue report. If acceptance dips in off-season, reduce the buffer or tighten windows; if average ticket rises and cancellations are stable, hold your line.

OUTPUT: [GOOGLE SHEETS SPEC — CELLS AND FORMULAS]

Drop these into a clean Google Sheet.

Suggested layout (cells):

- B3 L (loaded $/billable hr) … default [ENTER]
- B4 W (windshield, min) … default [30]
- B5 D (diagnostic, min) … default [40]
- B6 P (first-hour productivity, decimal) … default [0.70]
- B7 C (diagnostic close rate, decimal) … default [0.60]

Derived:

- B9 H (effective billable hours)

```
=(MIN(B4+B5,60)/60)/B6 + MAX(B4+B5-60,0)/60
```

- B10 Cost

```
=B3*B9
```

- B12 F_nonconvert

```
=CEILING(B10,10)
```

- B13 F_pooled (crediting policy)

```
=IF(B7>=0.95,"Use fee-stands or reduce credit",CEILING(B10/(1-B7),10))
```

- B15 Publish fee (crediting) — in-season buffer 10%

```
=IF(ISNUMBER(B13),CEILING(MAX(B12,B13)*1.10,10),CEILING(B12*1.10,10))
```

- B16 Publish fee (crediting) — off-season

```
=IF(ISNUMBER(B13),CEILING(MAX(B12,B13),10),CEILING(B12,10))
```

- B18 Publish fee (fee-stands) — in-season

```
=CEILING(MAX(B12,B10)*1.10,10)
```

- B19 Publish fee (fee-stands) — off-season

```
=CEILING(MAX(B12,B10),10)
```

- B20 MemberCredit (optional 15% loyalty credit)

```
=CEILING(B18*0.15,5)
```

Notes: Enter P and C as decimals (e.g., 0.70, 0.60). Adjust the 1.10 buffer and 0.15 credit to match your capacity and membership promise.