TEMPLATE

JUNE 16, 2026

THE FIVENUMBER WEEKLY SCORECARD (SERVICETITAN • JOBBER • HOUSECALL PRO)

A one-page, fill-in scorecard for home service owner-operators. Includes plain formulas, exact report paths in ServiceTitan/Jobber/Housecall Pro, trade-flavored starting targets, pitfalls to check, and a ‘pick one lever’ box to ship a 7-day test each week.

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One-Page Summary + Weekly Lever

Coaching Notes (from last week’s calls/estimates/AR)

Use this one-pager for a 10-minute Tuesday review. Fill it from last week’s data, pick one lever to ship in the next 7 days, and assign an owner. Keep it to the five numbers that catch the biggest leaks from call → cash.

HEADER — SET YOUR WEEK AND THRESHOLDS

- Shop: [SHOP NAME]
- Trade: [HVAC | PLUMBING | ELECTRICAL]
- Platform: [SERVICETITAN | JOBBER | HOUSECALL PRO]
- Week of (Mon–Sun): [YYYY-MM-DD]
- Business hours used for phone metrics: [HH:MM–HH:MM]
- Review crew: [DISPATCHER NAME], [LEAD TECH NAME], [OWNER/GM]
- Red/Yellow/Green thresholds (set once, adjust quarterly):
  - Missed-Call Rate: [GREEN ≤__% | YELLOW __–__% | RED ≥__%]
  - % First Response ≤15 min: [GREEN ≥__% | YELLOW __–__% | RED ≤__%]
  - Estimate Close Rate: [GREEN ≥__% | YELLOW __–__% | RED ≤__%]
  - Schedule Utilization: [GREEN __–__% | YELLOW __–__% | RED ≤__/≥__%]
  - Days-to-Cash OR % ≤7 Days: [GREEN ≤__ days | ≥__%]
- Notes carried over from last Tuesday: [NOTES]

KPI 1 — MISSEDCALL RATE

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Definition: Percent of inbound calls during business hours that were not answered by a human/queue (missed or abandoned).

- Formula: `Missed calls ÷ Total inbound calls` (business hours only).

Where to pull it

- ServiceTitan: Phones/Contact Center > Calls > Abandoned (and Answered). Filter: [Last Week], [Business Unit], [Business Hours]. Export if needed.
- Housecall Pro: Reporting > Voice > Call Log. Tabs: Inbound + Missed. Filter: [Date Range: Last Week]. Export CSV.
- Jobber: Via phone integration (e.g., CallRail). CallRail > Reports > Call Log (Missed vs Answered). Filter to tracking numbers and business hours. If no integration, use phone provider logs.

Starting targets (tune by season, not absolutes)

- HVAC: ≤8–12% in peak; ≤5–8% shoulder.
- Plumbing/Electrical: ≤5–10% most weeks.

Common pitfalls to check

- After-hours mixed into numerator; duplicate tracking numbers; voicemail counted as answered.

Pick one lever (choose one and assign)

- Route all missed calls to one queue with owner: [NAME].
- Two callbacks + 1 SMS within 15 minutes playbook live? [YES/NO].
- Turn on voicemail transcription + Slack/Teams alert to missed-call channel. [ON/OFF].
- Overflow to answering service after [X] rings during peak. [ON/OFF].

This week’s number: [%] Target: [%] Owner: [NAME] Status: [GREEN | YELLOW | RED]

KPI 2 — % FIRST RESPONSE ≤15 MINUTES

- Definition: Percent of new leads (calls, web forms, texts) that received the first human reply within 15 minutes during business hours.
- Formula: `Leads first-touched ≤15:00 ÷ Total new leads` (exclude truly after-hours unless you staff it).

Where to pull it (expect a simple spreadsheet join)

- ServiceTitan: Phones/Contact Center > Call Log (inbound/missed timestamps). Pair with Marketing Pro > Forms > Submissions (created time). Compute first outbound touch time (callback/SMS/email) from call log or CRM activity.
- Housecall Pro: Reporting > Voice > Call Log (inbound/missed). Pair with Inbox/Messages or Estimates created; calculate first outbound touch time. Export and compute `first_touch - created`.
- Jobber: Insights > Requests (Created) + Activity Feed events (first text/email/call) and/or CallRail first-return timestamp. Export and compute in sheet.

Starting targets (business hours focus)

- Aim for ≥60–80% within 15 minutes in-hours; use auto-acknowledge for off-hours.

Common pitfalls to check

- Auto-replies counted as “first touch” (decide your rule); web leads missing phone numbers; no single owner on the timer.

Pick one lever (choose one and assign)

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Turn on auto-acknowledge SMS/email: “Got it — we’ll call within 15 minutes during [HOURS].” [ON DATE].

- Assign SLA owner (name on the timer) per day: [NAME].
- Create a single “New Lead” queue board/column visible to dispatcher. [DONE/NOT YET].
- Add a big on-screen 15:00 timer macro for new leads. [INSTALLED/NOT YET].

This week’s number: [%] Target: [%] Owner: [NAME] Status: [GREEN | YELLOW | RED]

KPI 3 — ESTIMATE CLOSE RATE

- Definition: Percent of estimates sent/presented in the period that converted to approved/sold jobs.
- Formula (weekly, keep window consistent): `Approved (Sold) estimates ÷ Sent estimates`.

Where to pull it

- Jobber: Insights > Reports > Quotes Report (Conversion Rate). Filter by [Sent Date: Last Week]. Note: Jobber conversion can exceed 100% if quotes convert without being marked “sent.”
- Housecall Pro: Reporting > Estimates > Conversion Rate. Filter [Last Week] and by business unit/tech as needed.
- ServiceTitan: Reports > Estimates (e.g., Estimate Performance / Sold by Technician). Filter [Date Sent: Last Week]. If needed, compute: count Sold ÷ count Sent.

Starting targets (use as a baseline)

- HVAC: 50–65% (varies with season and ticket size).
- Plumbing: 60–75%.

- Electrical: 55–70%.

Common pitfalls to check

- Techs not marking quotes “sent” or “sold”; duplicate versions; expired quotes dragging rate.

Pick one lever (choose one and assign)

- Ship 3-option template (Good/Better/Best) in your quoting tool. Owner: [NAME]. Due: [DATE].
- Set 7-day expiration with auto-reminders (Day 2/4/6). [ON/OFF].
- Add online approval + deposit link to every quote. Deposit: [__%].
- Require on-site present + same-day SMS follow-up with link. [RULE PUBLISHED DATE].

This week’s number: [%] Target: [%] Owner: [NAME] Status: [GREEN | YELLOW | RED]

KPI 4 — SCHEDULE UTILIZATION

- Definition: How full the schedule is relative to crew capacity.
- Formula: `Booked crew hours ÷ Available crew hours` for the week.
    - Booked hours = sum of scheduled job durations (crew-adjusted).
    - Available hours = total workable crew hours minus PTO/meetings minus reserved rescue capacity.

Where to pull it

- ServiceTitan: Operations > Dispatch Board > Adaptive Capacity (Provided vs Consumed). Or Reports > Scheduling Utilization. Filter [Last Week].
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Housecall Pro: Reporting > Create a Report > Travel & Job Duration Time. Sum durations for [Last Week].

- Jobber: Jobs/Visits (scheduled durations) + Insights > Timesheets (total hours worked). Compute ratio.

Starting targets (protect a rescue slot)

- Most weeks: 85–95% utilization with 10–15% same-day/rescue capacity.

Common pitfalls to check

- Travel time not included; multi-tech jobs double-counted; PTO not subtracted from available.

Pick one lever (choose one and assign)

- Switch to AM/PM (or 3-window) arrival buckets. Go-live: [DATE].
- Hold a daily [1–2 hr] rescue block; release at [TIME] if unused. Owner: [NAME].
- Next-day confirmation text at [HH:MM] with reschedule link. [ON/OFF].
- Map zip-clusters to reduce windshield time on peak days. [DONE/NOT YET].

This week's number: [%] Target: [%] Owner: [NAME] Status: [GREEN | YELLOW | RED]

KPI 5 — DAYS TO CASH OR % COLLECTED ≤7 DAYS

Pick one version and stick with it each quarter.

Option A — Days-to-Cash (average)

- Definition: Average days from job completion to full payment.
- Formula: `Avg( Payment Date – Job Completed Date )` for jobs completed last week.

Option B — % Collected ≤7 Days

- Definition: Share of jobs paid in full within 7 days of completion.
- Formula: `# Jobs paid ≤7 days ÷ # Jobs completed` last week.

Where to pull it

- ServiceTitan: Reports > AR Transactions; Dashboards > Customer Aging. Filter by [Completed Date: Last Week]. Export for exact day counts if needed.
- Housecall Pro: Reporting > Invoices > Aging (Past Due) + Payments export. Filter [Completed Last Week].
- Jobber: Insights > Reports > Payments (date received) + Aged Receivables. Filter [Last Week Completed].

Starting targets (based on common platform patterns)

- Average days-to-cash ≤7 days; or ≥80% collected within 7 days.

Common pitfalls to check

- Invoices created late; jobs left “open”; check payments not deposited promptly; deposits not tied to jobs.

Pick one lever (choose one and assign)

- Same-day invoicing rule at job completion. Owner: [NAME]. Go-live: [DATE].
- Require stored card/ACH on file for service agreements. [ON/OFF].
- Add deposit policy for jobs > [$ AMOUNT] at [__%]. Effective: [DATE].
- Turn on text-to-pay links on completion. [ON/OFF].

This week’s number: [__ | %] Target: [| __%] Owner: [NAME] Status: [GREEN | YELLOW | RED]

ONEPAGE SUMMARY + WEEKLY LEVER

List the five numbers at a glance and pick one lever to ship this week.

- Missed-Call Rate: [__%] Status: [G/Y/R]
- % First Response ≤15 min: [__%] Status: [G/Y/R]
- Estimate Close Rate: [__%] Status: [G/Y/R]
- Schedule Utilization: [__%] Status: [G/Y/R]
- Days-to-Cash OR % ≤7 Days: [__ | __%] Status: [G/Y/R]

This week’s single lever

- KPI chosen: [NAME]
- Lever description: [WHAT WE’RE CHANGING]
- 7-day test scope: [TEAM/ZIP/CALL TYPE]
- Owner: [NAME]
- Start: [DATE] End: [DATE]
- Expected lift by next Tuesday: [NUMBER/OUTCOME]
- Blockers: [LIST]

Next Tuesday checklist

- Did we ship it? [YES/NO]
- Result vs expectation: [NOTES]

- Keep, kill, or iterate? [KEEP/KILL/ITERATE]

COACHING NOTES (FROM LAST WEEK'S CALLS/ESTIMATES/AR)

Space for coaching notes from call reviews, estimate ride-alongs, or AR follow-ups.

- Call-handling notes (from 3 call listens):
  - [CALL 1 NOTE]
  - [CALL 2 NOTE]
  - [CALL 3 NOTE]
- Estimate follow-up notes (from 3 quotes):
  - [QUOTE 1 NOTE]
  - [QUOTE 2 NOTE]
  - [QUOTE 3 NOTE]
- Collections notes (from 3 overdue invoices):
  - [INV 1 NOTE]
  - [INV 2 NOTE]
  - [INV 3 NOTE]

Parking lot for fixes we're not doing this week: [LIST]