



*The solution to excellence in service performance.*

**It's not simply a software program. It's a system that creates consistent profitability through accountability!**



***If you want double digit profit in your service department, then this is the program for you!***

## **Happy Customers Are Our Best Marketing Tool!**

*"I implemented the Super Tech 500 Bonus program and after only two months, we have seen at least a 30% increase in production. The word has gotten out to other techs in our city and we are getting calls daily for interviews.*

*Those techs that are not performing know exactly where they are not productive and they also know that we have a list of applicants to replace them with if they don't improve."*

*Mickey McCurdy, MMM Pbg, Htg & Clg, Amarillo, TX*

*I have two service techs and two tune-up techs. After the first 2 months each tune-up tech was a SuperTech winner.*

*In the third month, the service tech which was in 4th place, was in 1st place. He was also the 1st guy to hit his numbers. During the past 3 months I have seen their numbers double. I am looking forward to seeing them all reach their goals, and at the current pace that should happen very soon.*

*Aside from the individual techs' performances improving, my overall numbers have improved dramatically. I originally had an annual \$300,000 lost service revenue due to under performance and now I'm at \$117,000 annual lost revenue, and I am improving rapidly. My Lifetime Customer Loss was over 3 million dollars with my prior service department performances and now, it is only \$700,000. I will have virtually no loss well before mid-year. My techs are gung hoe and excited! The technician who is currently in last place talked to me this morning after our company meeting he wants me show him what he's doing wrong so he can be number one!!!*

*This tool is definitely the only one of its kind, there is no substitute. Thanks!*

*Brad Bradley, Bradley Mechanical  
Chesterfield, VA*

**Tom Grandy  
Grandy & Associates**

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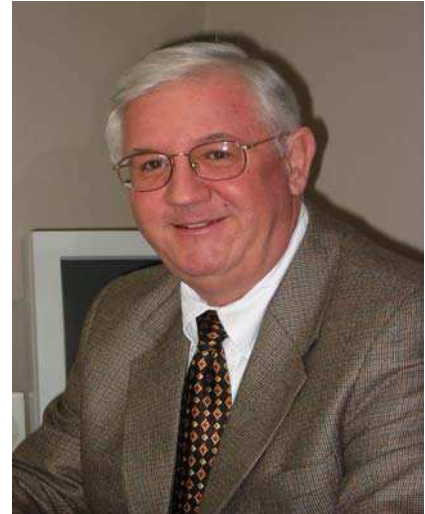
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For additional information and  
sample reports, be sure to check out  
Grandy & Associates' website:

[www.GrandyAssociates.com](http://www.GrandyAssociates.com)

**Comments from Tom Grandy,**  
**President of Grandy & Associates**

ProfitMaxx is a performance-based software program designed to help the service manager and/or owner run a *significantly more profitable* service department. Before profitability can be improved, specific attainable goals must first be set in three areas: Demand Service, Maintenance Agreements and “ProfitSmart” activities (i.e., generating sales leads and selling S/As). Once attainable goals are set, the service manager must then have accurate, timely data in a readable format to make those tough, but critical, decisions concerning overall profitability.



Tom Grandy  
President, Grandy & Associates

**ProfitMaxx is designed to provide all the data needed to manage a very profitable service department!**



ProfitMaxx, the new industry-acclaimed software, is designed to provide the service contractor with the service performance numbers they need in order to dramatically improve service profitability. ProfitMaxx, is by far the leading service performance tool in the trades’ industry today – it has no equal. It is not an accounting software, dispatching software or flat rate pricing system. ProfitMaxx is service-performance software for the management of your technicians and the entire service department. The implementation of ProfitMaxx is quick and non-invasive to the contractor’s business. There is no system shock....just a new and easy way to understand and use the time card. Owners have typically seen increases in service technician productivity of 50% or more *plus* increased revenues of \$20,000 to \$30,000 per technician.

***ProfitMaxx unlocks the power of information!***

ProfitMaxx has the ability to *significantly increase the bottom-line profitability of any contractor’s service department*. We highly recommend that all contractors serious about profitable growth purchase this program.

*Tom Grandy*, President

# ProfitMaxx Needs to be the Heart of Your Service Department!



ProfitMaxx software produces information that is so easy to read any service manager and/or owner can easily understand the numbers.

ProfitMaxx is performance-based software specifically designed to increase the productivity, efficiency and profitability of your service department. It is a stand-alone program and does not interfere, or currently interface with, accounting or dispatching programs. Information is input from a simple daily timesheet (data entry takes approximately 2-3 minutes per day/per tech) which produces all the information an owner or service manager needs to accurately and effectively track productivity by tech, leading to significantly higher profit margins. Once the data is input, reporting is easily and immediately available--allowing the user to make "mid-course" corrections, if necessary.

***Immediately after data is input, you will know the following:***

## **Once data is input you will instantly know:**

- Who is your most and least productive tech
- Who collected what percentage of the money while on the job
- How many callbacks each tech had
- Which techs under-billed the customer and by how many dollars
- Who finished the job on time, the first time. If they did not finish--why not
- Who met or exceeded their daily, weekly and/or monthly goal
- How many sales leads were generated by each tech including how many S/As they sold
- Which tech generated the most revenue per billed hour
- Who had the most non-billable time (and what was the source)
- Does the company have the right number of service techs based on the number of calls they receive
- How long did it really take the tech to perform the service agreement (compared to the allotted time in your agreement pricing)

***Do you think having this kind of information at your fingertips would increase profitability?***

# In addition to measuring tech productivity, PROFITMAXX also provides several other really valuable reports!


## SuperTech 500 Bonus System:

SuperTech 500 is a technician-bonus system based on real, accurate and measured performance. Each Key Performance Indicator is measured and converted into points in nine categories, all of which have solid industry defaults preset in **PROFITMAXX**. You can change any, or all, of them to best fit your company goals and marketing structure. The bonus system measures the following areas:


1. Billable Index
2. Sales Leads Overall
3. Sales Leads Old Equipment
4. Maintenance Agreements Sold
5. Completion Ratio
6. Personal Performance
7. Maintenance Performance
8. Billable Labor Ratio
9. Revenue Goal Performance

There are two other categories, which can be used at your discretion:

1. Attaboys
2. Pole Points



Sample Company  
*SuperTech 500*  
July 2003



Victory Lane		Performance Metrics										Bonus Points			Cup Standings		
Rank	Technician	Fetch	Billable Index	Sales Leads (Overall)	Sales Leads (Old Equipment)	Maintenance Agreements Sold	Completion Ratio	Personal Performance	Maintenance Performance	Billable Labor Ratio	Revenue Goal Performance	Attaboys	Pole Points	Points	Pit Time	Points	Rank
1	Rob Roy	100	10	8	12	85	78	40	10.0	100	0	0	450.0				
2	Bryant Bryant	4	100	2	2	10	72	73	46	8.1	123	0	0	436.1	27.2	3808.7	1
3	Shawn Kemp	2	62	2	2	12	83	81	97	10.0	93	0	0	442.0	17.8	3090.9	4
4	Bruse Dum	1	77	6	4	11	87	78	62	10.0	112	0	0	444.0	20.7	3181.0	3
5	Team Average	3	85	4	4	15	79	77	40	10.0	115	0	0	439.0	39.5	3250.9	2
Team Average		83.5	3.0	3.0	12.0	80.3	76.8	61.3	9.5	119.8	9.0	9.9	440.3	29.6	3209.6		

**Bonus Points**    Category: Attaboys    Dates: 1 to 31    Scoring: 5 points per attaboy

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Like the Nextel Cup (Winston Cup), there are point standings year-to-date for each technician so that you can have a strong finish to your year, which can alter the standings!

Each month, the top three technicians are listed in Victory Lane along with their points earned by category, pit time and year-to-date cup standings and ranking.

Companies use points in many different ways:

- Determining next year's pay increase
- Determining bonus multipliers
- Redeeming points using sport and brown goods catalogs
- Providing formal training
- Competing for next new truck
- SuperTech jackets, hats, patches, and shirts

***Tech bonuses are no longer based on "Gee, I think Bob did a good job this year." Bonuses can now be paid based on real, measured productivity!***

# Market Analysis Report:

Have you ever wondered about your customer base, in terms of what areas are the most profitable, require the most/least travel time, which generate the most sales leads and/or which percentage have service agreements (by area). Wonder no more! The timesheet records each call by location. From this simple code you will soon be able to answer all of the above questions and a whole lot more.

View the report by week, month, year or years. It won't be long before you will know which service areas are the most or least profitable. You will find out where most of your callbacks come from and/or which areas have the highest average ticket price. You will soon know the answer to all these questions, by area of service.

With this kind of information at your fingertips, you will be able to better direct your marketing dollars. Take a look at the following report and begin to think about the overall value of this type of information and how it can increase your service department's profitability!

## Market Location Analysis

Sample Company

June 1, 2005 to June 20, 2005

Location	Total Hours	Maint Cust Percent	Sales Leads	Sales Lead Percent	Maint Agree Sold	Maint Agree Percent	Service Time Percent	Average Travel Time	Travel Hours	Non-Travel Hours	Total Revenue	Performance Indicator	Total Service Calls	Follow Ups	No Shows
ATHOL	4.5	100%	0	--	0	--	2%	5	0.08	4.42	\$657	14	1	0	0
CDA - DOWNTOWN	46.9	77%	3	25%	0	0%	24%	11	3.98	42.92	\$4,011	23	22	2	0
CDA - GOLF AREA	7.85	60%	1	20%	0	0%	4%	14	1.2	6.65	\$978	16	5	0	0
CDA - INDUSTRIAL	1.5	0%	0	0%	0	0%	1%	1	0.02	1.48	\$178	17	1	0	0
CDA - LAKE	8.67	33%	0	0%	1	50%	4%	5	0.27	8.4	\$848	20	3	0	0
CDA - NORTHSIDE	50.55	73%	3	20%	3	50%	25%	8	3.62	46.93	\$4,828	21	26	1	0
DALTON	7.92	83%	0	0%	0	0%	4%	9	0.93	6.98	\$949	17	6	0	0
HAUSER	2.13	50%	0	--	0	--	1%	16	0.52	1.62	\$87	49	2	0	0
HAYDEN	4.38	33%	0	0%	0	0%	2%	17	0.83	3.55	\$433	20	3	0	0
HAYDEN LAKE	14.22	43%	2	40%	1	50%	7%	14	1.58	12.63	\$1,344	21	7	1	0
POST FALLS	32.68	78%	0	0%	1	11%	16%	15	4.38	28.3	\$2,177	30	18	2	0
RATHDRUM	8.62	75%	0	0%	0	0%	4%	31	2.07	6.55	\$896	19	4	0	0
SANDPOINT	1.98	0%	0	0%	0	0%	1%	14	0.23	1.75	\$217	18	1	0	0
SILVER VALLEY	6.47	50%	0	0%	0	0%	3%	43	1.43	5.03	\$578	22	2	0	0

All calls to the ATHOL location were to maintenance customers.

All other locations had no activity during this time period.

The two locations with the most sales leads generated were DOWNTOWN and NORTHSIDE.

The SILVER VALLEY area required the most travel time.

The goal is to have 25 cents on the dollar. Note the most profitable areas of ATHOL followed by GOLF AREA.

The majority of service calls were to the NORTHSIDE location.

## Data Entry Is Easy and Reporting is Immediate!

Data entry only takes 2-3 minutes per tech, per day. The only information required is the Action Code highlighted in blue on the screen.

The screenshot shows the 'Timesheet Entry' window for user 'Bruce Durn'. The 'Action Code' dropdown menu is set to 'SO1 - Service with Diagnostic', which is highlighted in blue. A black arrow points to this dropdown. Other fields include 'Action Date' (9/4/2007), 'Dispatch Time' (12:00 AM), 'Arrive Time' (12:00 AM), 'Diagnostic Time' (12:00 AM), and 'End Time' (12:00 AM). The 'Total Hours' field shows '0.0'. There are sections for 'Maintenance Agreement' and 'Invoice' with various input fields.

When an action code is selected from the drop-down menu (i.e., SO-2, Service with Diagnostic), the white boxes or fields that appear must be entered.

Notice in the second screen, when the action code "AO3 - Formal Training" is selected, only those fields pertaining to that action code appear on the data entry screen. This makes data entry simple, clean and quick.

The screenshot shows the 'Timesheet Entry' window for user 'Bruce Durn' with the 'Action Code' dropdown menu set to 'AO3 - Formal Training', highlighted in blue. A black arrow points down from the text above to this dropdown. The form is simplified, showing only 'Action Date' (9/4/2007), 'Description' (Formal Training), 'Location Code' (empty), 'Start Time' (12:00 AM), 'End Time' (12:00 AM), and 'Total Hours' (0.0).

## **Timesheet Review Is Simple, Immediate and Often Eye-Opening!**

Once a Data Entry Clerk enters the daily timesheet (which takes about 2-3 minutes per tech per day) the service manager and/or the owner can quickly review all the tech's timesheets in a matter of minutes. Under-billing will immediately become obvious since income that exceeded the goal will be shown in **GREEN** and under-billing will immediately show up in **RED**. Note the sample timesheet below.

The screenshot shows the 'Timesheet Entry' window with the following data:

Field	Value
Action Date	6 / 25 / 2003
Action Code	S01 - Service With Diagnostic
Maintenance Customer	Yes
Customer / Job	LOUCK
Location Code	
Invoice / Job #	331415
Service Type	Residential
Customer No Show	<input type="checkbox"/>
Dispatch Time	12 : 45 PM
Arrive Time	1 : 40 PM
Diagnostic Time	1 : 55 PM
End Time	3 : 15 PM
Total Hours	2.5
Units Sold	0
Amount	\$0.00
Sales Lead	No
Equipment Age	Medium
Completion Code	YES - Complete

Invoice Item	Actual	+ / -
Diagnostic Charge	\$72.00	\$4.00
Repair Charge	\$198.00	\$71.33
PaymentType	Cash/Credit	

Notice for this service call, the technician over billed the customer by \$4.00 on the diagnostic fee (GREEN) and under-billed by \$71.33 for the repair (RED), based on the company's billing format entered during setup.

The service manager and/or owner can review all the technicians' calls in a matter of minutes. If I were the service manager I would immediately ask the technician why he under-billed by this amount. It is often a matter of simply not writing down all the codes or not recording all the parts, if the company is on flat rate pricing, or the time used on the job or improper markup of parts, when the company is on time and materials,. At any rate, the ability to quickly review timesheet data provides the manager the information needed to properly manage their department.



## Payroll Summary Report – Accounting Loves This!

One of the great benefits of ProfitMaxx is that it summarizes all of the tech's time and spiffs into a very simple, easy-to-read format for the payroll people. No more trying to read the tech's handwriting and, best of all, no more worrying or tracking down the tech to get their timecard.--The service manager will be **sure** the timesheet is filled in, so he/she can manage the department. When the service manager has his/her information, accounting will automatically have what they need for payroll. A sample summary report is below. Keep in mind the spiffs are entered during the setup of the software based on what YOU pay.

Timesheet Summary								Sample Company	
Shawn Kemp								July 1, 2003 to July 11, 2003	
Straight Time Hours									
Date	Travel, Unapplied, Manager Applied Hours	Company Meeting Hours	Formal Training Hours	Vacation Hours	Holiday Hours	Sick / Personal Hours	Remaining Hours	Total Hours	
Tue, Jul. 1	1.83	0.75	-	-	-	-	4.17	6.75	
Wed, Jul. 2	2.67	0.75	-	-	-	-	2.58	6	
Thu, Jul. 3	0.42	1	-	-	-	4	2.58	8	
Fri, Jul. 4	-	-	-	-	8	-	-	8	
Mon, Jul. 7	2.25	-	-	-	-	-	6	8.25	
Tue, Jul. 8	2.25	-	1.5	-	-	-	4.5	8.25	
Wed, Jul. 9	1	1.25	-	-	-	-	5	7.25	
Thu, Jul. 10	3.83	0.5	-	-	-	-	8.17	12.5	
Fri, Jul. 11	-	-	-	8	-	-	-	8	
<b>Total Hours</b>	<b>14.26</b>	<b>4.26</b>	<b>1.5</b>	<b>8</b>	<b>8</b>	<b>4</b>	<b>33</b>	<b>78</b>	
							<b>Excluding Sick/Personal</b>	<b>88</b>	
Hours By Location									
		Working Hours	Travel Hours	Vacation Hours	Holiday Hours	Sick / Personal Hours		Total Hours	
Portland 801									
Beaverton		7.67	2.58	-	-	-		10.25	
Clackamas		4.42	1.75	-	-	-		6.17	
Portland		4.92	2.5	8.0	8.0	4.0		27.42	
Shop		6.5	-	-	-	-		6.5	
Tigard		7.17	2.75	-	-	-		9.92	
<b>Total</b>		<b>30.68</b>	<b>9.68</b>	<b>8</b>	<b>8</b>	<b>4</b>		<b>80.28</b>	
Washington 803									
Vancouver		10.33	2.42	-	-	-		12.75	
<b>Total</b>		<b>10.33</b>	<b>2.42</b>	<b>0</b>	<b>0</b>	<b>0</b>		<b>12.76</b>	

Timesheet Summary Report

Spiff Report

Spiff Earned					
Service Type: ALL					
July 1, 2003 -- July 11, 2003					
	Total	Bruce Durn	Bryant Bryant	Rob Roy	Shawn Kemp
<b>Maintenance Agreement Units Renewed</b>					
Total Renewed	6	0	2	2	2
Spiff Amount Earned	\$90.00	\$0.00	\$30.00	\$30.00	\$30.00
<b>Maintenance Agreement Units Sold</b>					
Total Sold	13	7	0	1	5
Spiff Amount Earned	\$195.00	\$105.00	\$0.00	\$15.00	\$75.00
<b>Sales Leads</b>					

# ProfitMaxx Purchase Form

It sounds like the ProfitMaxx software, will substantially increase our service department's profits. The cost of \$4,995 includes:

- ProfitMaxx software;
- FREE technical support;
- Tutorial CD's, powerful Help screens, and a step-by-step manual for setup, roll out and implementation of the program
- SuperTech 500 Bonus system (part of ProfitMaxx software) for your techs; and
- Market analysis (e.g., what market areas are most/ least profitable, who has service agreements, what areas have highest ticket prices, the least no-shows, etc.) (also part of ProfitMaxx software).

*ProfitMaxx software will  
give you control of your  
service department.*

**Order today!**

## Method of payment:

Charge full payment of \$4,995 against our credit card:

Card number \_\_\_\_\_ Exp date \_\_\_\_\_

Signature: \_\_\_\_\_

Invoice us for the full amount; a check will be forthcoming.

Leasing: We would like to lease the program for the \$4,995 (approximately \$250/month for a 24-month lease or \$180/month for a 36-month lease. **NO DOWN PAYMENT IS REQUIRED** [Please complete and return the attached Financing Application Form (required)].

## **Registration Information:**

Company name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ ST: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

FAX: \_\_\_\_\_

E-mail: \_\_\_\_\_

Contact Person: \_\_\_\_\_

## **Return Form to:**

### **Grandy & Associates**

1020 Halifax Drive  
Suite 102  
Owensboro, KY 42301

Phone: 800-432-7963  
(Canada: 270-926-3212)  
FAX: 270-684-7425

E-mail:

[TomGrandy@GrandyAssociates.com](mailto:TomGrandy@GrandyAssociates.com)

Website: [www.GrandyAssociates.com](http://www.GrandyAssociates.com)



eLease  
2820 1<sup>ST</sup> Avenue North  
St. Petersburg, FL 33713

Tel: 1-800-499-2577

Fax: 800-233-8303

# Lease Application

Rev 02.02

## Lessee

Company Name: \_\_\_\_\_  
 DBA: \_\_\_\_\_ Fed Tax ID: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State & Zip: \_\_\_\_\_  
 Business Phone #: \_\_\_\_\_  
 Contact Name: \_\_\_\_\_ Phone #: \_\_\_\_\_  
 e-Mail: \_\_\_\_\_ Fax: \_\_\_\_\_  
 Business Description: \_\_\_\_\_  
 Time In Business Under Current Ownership: \_\_\_\_\_  
 Type of Business:  S-Corp  LLC  Proprietorship  
 Partnership  Corporation  Non-Profit

## Vendor

Company Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State & Zip: \_\_\_\_\_  
 Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_  
 Contact: \_\_\_\_\_

## Bank References

Principal Bank: \_\_\_\_\_  
 Account Numbers: \_\_\_\_\_  
 Telephone: \_\_\_\_\_  
 Contact: \_\_\_\_\_

## Personal Information on Officers, Partners or Owners

Name: \_\_\_\_\_  
 Home Address: \_\_\_\_\_  
 City, State & Zip: \_\_\_\_\_  
 Telephone: \_\_\_\_\_  
 Social Security # \_\_\_\_\_ % Ownership: \_\_\_\_\_  
 Signature: \_\_\_\_\_  
 Print Name: \_\_\_\_\_  
 Date: \_\_\_\_\_

Name: \_\_\_\_\_  
 Home Address: \_\_\_\_\_  
 City, State & Zip: \_\_\_\_\_  
 Telephone: \_\_\_\_\_  
 Social Security # \_\_\_\_\_ % Ownership: \_\_\_\_\_  
 Signature: \_\_\_\_\_  
 Print Name: \_\_\_\_\_  
 Date: \_\_\_\_\_

By signing below, the undersigned individual, who is either a principal of the credit applicant or a personal guarantor of its obligations, provides written instruction to Lessor or its designee (and if any assignee or potential assignee thereof) a authorizing review of his/her personal credit profile from a national credit bureau. Such authorization shall extend to obtaining a credit profile in considering this application and subsequently for the purposes of update, renewal or extension of such credit or additional credit and for reviewing or collecting the resulting account. A photostat or facsimile copy of this authorization shall be valid as the original. By signature below, I/we affirm my/our identity as the respective individual(s) identified in the above application.

## New Equipment to be Leased (Attach equipment schedule if necessary)

Address of Installation: \_\_\_\_\_

Quantity	Model	Description	Serial Number(s)	Purchase Price (w/o tax)

## Comparable Lending References and Trade References

Name: _____	Phone Number: _____	Contact Person: _____	Account Number: _____
Name: _____	Phone Number: _____	Contact Person: _____	Account Number: _____
Name: _____	Phone Number: _____	Contact Person: _____	Account Number: _____

I authorize all deposit, borrowing, and trade information to be released to the Lessor. I hereby represent all information is true, correct and complete. A photo static or facsimile copy of this authorization shall be valid as the original.

Signature: \_\_\_\_\_  
(Authorizing Officer Signature)  
 \_\_\_\_\_  
(Please Print Name)

Title: \_\_\_\_\_ Date: \_\_\_\_\_

Please fax completed application to  
800-233-8303

The Federal Equal Credit Opportunity Act prohibits creditors from discriminating against credit applicants on the basis of race, color, religion, national origin, sex, marital status, age (provided the applicant has the capacity to enter into a binding contract), because all or part of the applicant's income derives from any public assistance program or because the applicant has in good faith exercised any right under the Consumer Credit Protection Act. The federal agency that administers compliance with this law is the Federal Trade Commission Equal Credit Opportunity, Washington, D.C. 20580.

If your application for business credit is denied, you have the right to a written statement of the specific reasons for the denial. To obtain the statement, please contact Lessor set forth above within 60 days from the date you are notified of our decision. We will send you a written statement of reasons for the denial within 30 days of receiving your request for the statement.

# Support Material

Daily Timesheet

Key Performance Indicator Report  
(with detailed definitions of each indicator)

Additional sample reports may be  
viewed on our website at:

**[www.GrandyAssociates.com](http://www.GrandyAssociates.com)**

# Daily Timesheet

Daily Timesheet													Sample Company						
Technician _____										Date _____			M	Tu	W	Th	F	Sa	Su
Action Code	Customer / Job	Invoice / Job #	Service Type	Maintenance Agreement			Sales Lead	Age	Dispatch Time	Arrive Time	Diagnostic Time	End Time	On-Call Travel Home Time	Total Hours	Invoice Amount		Completion Code		
				Units Sold	Units Renewed	Units Svc'd									Trip/ Diagnostic	Repair			
MC	Location	Orig. Tech.	Commercial Residential	\$	\$		Yes No	Old Med New							\$	\$			
															Cash/Credit	Direct Bill			
MC	Location	Orig. Tech.	Commercial Residential	\$	\$		Yes No	Old Med New							\$	\$			
															Cash/Credit	Direct Bill			
MC	Location	Orig. Tech.	Commercial Residential	\$	\$		Yes No	Old Med New							\$	\$			
															Cash/Credit	Direct Bill			
MC	Location	Orig. Tech.	Commercial Residential	\$	\$		Yes No	Old Med New							\$	\$			
															Cash/Credit	Direct Bill			
MC	Location	Orig. Tech.	Commercial Residential	\$	\$		Yes No	Old Med New							\$	\$			
															Cash/Credit	Direct Bill			
MC	Location	Orig. Tech.	Commercial Residential	\$	\$		Yes No	Old Med New							\$	\$			
															Cash/Credit	Direct Bill			
MC	Location	Orig. Tech.	Commercial Residential	\$	\$		Yes No	Old Med New							\$	\$			
															Cash/Credit	Direct Bill			

B01 Service With Diagnostic B02 Service Follow-Up (no diagnostic) B03 Diagnostic Only B04 Extended Warranty B05 Tune Up M01 Residential Maint. (non-renewable) M02 Residential Maint. (renewable) M03 Commercial Maintenance M04 Commercial Filter Change T01 Transfer (Other Department) CB01 Same Technician Call Back CB02 Other Technician Call Back CB03 Transfer Call Back CB04 Product Warranty	A01 Manager Applied Time A02 Company Meeting A03 Formal Training A04 Early Off Work A05 Vacation A06 Holiday A07 Sick / Personal A08 No Work A09 Lunch	ON-CALL OC01 Service With Diagnostic OC02 Service Follow-Up (no diagnostic) OC03 Diagnostic Only OC04 Extended Warranty OC05 Same Technician Call Back OC06 Other Technician Call Back OC07 Transfer Call Back OC08 Product Warranty OC09 Manager Applied Time	Completion Codes YES Complete NL Need Labor Assist NP Need Parts NT Need Tech Assist NS Customer No Show MC Maintenance Customer	Total Hours Mileage Start Mileage End	Manager Signature Were you involved in a work related accident today and inform your manager immediately? <input type="checkbox"/> Yes <input type="checkbox"/> No Manager _____
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Gas Furnace Old Over 12 Years Medium 5 To 12 Years New Under 5 Years	Oil Furnace & Boiler Old Over 23 Years Medium 8 To 23 Years New Under 8 Years	Air Conditioner Old Over 12 Years Medium 5 To 12 Years New Under 5 Years	Heat Pump Old Over 15 Years Medium 5 To 15 Years New Under 5 Years
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Employee Signature \_\_\_\_\_ Date \_\_\_\_\_

## Comments on the timesheet:

- This simple timesheet only takes about 5 minutes per day, per tech, to enter into the ProfitMaxx software
- Customer can customize the four types of equipment and input the expected age of each
- The tech simply looks at his or her watch and records the dispatched time, arrival time, time diagnostic was completed and the time when the repair was completed
- Descriptions of the action codes are shown on the following pages

The data from this simple timesheet (which only takes 3 minutes per day, per tech to input) is all that is needed in order to produce all the reporting. Reporting is immediately available once the data is input!

# Key Performance Indicators Report

This is a summary report covering all of the **Key Performance Indicators** for each tech. At a glance the owner/service manager can have an excellent grasp of the overall productivity and efficiency of the service department.

There are multiple reports that show the details of each item so you can pinpoint problems, increase efficiency and therefore, increase profits!

**Note:** The values in the Goal column begin as an industry standard but each may be modified by the user.

Key Performance Indicators		Sample Company				
Service Type: ALL July 1, 2003 -- July 31, 2003	Goal	Bruce Durn	Bryant Bryant	Rob Roy	Shawn Kemp	
<b>Revenue</b>						
Average Revenue Per Hour	\$79.48	\$65.81	\$67.67	\$77.05	\$78.79	
Average Revenue Per Billable Hour	\$130.29	\$130.83	\$80.56	\$100.12	\$123.50	
Percent Of Revenue Goal From Opportunity	100%	103.30%	78.03%	103.18%	100.28%	
Billable Index	100	100	62	77	95	
Billing Efficiency	100	114	72	89	103	
Residential Collection COD	100%	63%	60%	68%	62%	
<b>Residential Maintenance</b>						
Maintenance Agreement Efficiency	100%	92%	65%	63%	111%	
Maintenance Call Efficiency	100%	124%	96%	73%	141%	
Average Repair Revenue Per Hour	\$40	\$43.27	\$40.63	\$13.30	\$39.69	
<b>Profitability</b>						
Average Contribution Per Hour	\$79.48	\$78.15	\$80.30	\$83.96	\$90.47	
Percent Of Revenue Goal From Opportunity - Blended	100%	122.66%	92.60%	112.43%	115.15%	
Performance Indicator - Overall Hours	25	32	22	26	27	
Performance Indicator - Billable Hours	20	15	18	19	16	
Performance Indicator - Overall Blended Hours	25	27	19	24	23	
<b>ProfitSmart Performance</b>						
Sales Leads - Overall	12%	4.26%	5.71%	10.42%	13.79%	
Sales Leads - Old Equipment	33%	10.00%	18.18%	13.33%	33.33%	
Maintenance Agreements Sold - Overall	42%	41.67%	18.18%	62.50%	27.27%	
Maintenance Agreements Sold - Old Equipment	12%	57.14%	0.00%	60.00%	0.00%	
<b>Labor Leverage</b>						
Manpower	3.3 (4)	1.0	0.8	1.0	0.7	
Billable Labor Ratio	10 : 1	8.1 : 1	10.4 : 1	20.3 : 1	11.6 : 1	
Percent Of Total Service Calls	--	29.37%	22.38%	27.97%	20.28%	
Percent Of Total Travel Hours	--	27.84%	24.66%	28.87%	18.63%	
First Time Completion Percentage	95%	71.70%	83.02%	86.79%	78.79%	
Call Back Percentage	2.75%	6.15%	5.26%	10.29%	2.22%	
<b>SuperTech Contribution</b>						
Total Points	--	436.1	442.0	444.0	439.0	
Super Contribution	--	\$19,153.57	\$19,430.11	\$28,231.43	\$24,572.96	

Bruce's average revenue per billable hour was \$130.83. Note that Bryant's was only \$80.56.

Rob collected money on 68% of his service calls.

Bruce generated an additional \$43.27 per hour while performing maintenance service.

The goal was 25 cents on the dollar and Bryant was very efficient at just 19.

The goal was to turn 12% of service calls into sales leads. Shawn got sales leads from 13.79% of his service calls.

Bruce only completed 71.70% of the service calls on the first visit.

10.29% of Rob's calls resulted in a call back.

# Key Performance Indicators and Definitions

## Revenue

**Average Revenue Per Hour** is the revenue generated from service calls during the total overall hours worked by the technician.

**Average Revenue Per Billable Hour** is the revenue generated during the time spent on billable service calls

**Percent Of Revenue Goal From Opportunity** is the technicians daily revenue goal adjusted for their opportunity to bill based on how they were dispatched.

**Billable Index** shows your technicians billing performance against the expected revenue per billable hour.

**Billing Efficiency** measures the technicians billing skills against your billing format of flat rate *or* time and material.

**Residential Collection COD** is the percentage of time the technician collects on a residential service call before leaving the location.

## Residential Maintenance

**Maintenance Agreement Efficiency** measures the performance of the technician against the structure of the maintenance agreement in the time allotted.

**Maintenance Call Efficiency** measures the performance of the technician against the structure of the maintenance agreement in time, parts and accessories.

**Average Repair Revenue Per Hour** is the revenue produced on a maintenance service call from sales of accessories or additional repairs performed that are outside of the structured maintenance agreement.

# Key Performance Indicators and Definitions

## Profitability

**Average Contribution Per Hour** is all revenue generated from service calls plus the maintenance monies earned from your escrowed maintenance account after performing maintenance agreement call during the total overall hours worked.

**Percent Of Revenue Goal From Opportunity – Blended** is the same as the Percent Of Revenue Goal From Opportunity in the Revenue section, with the exception of the additional element of adding in the labor credits from performing scheduled maintenance agreements, thus the word "blended".

**Performance Indicator – Overall Hours** is the fully loaded labor paid out to the technician compared with the overall revenue generated.

**Performance Indicator – Billable Hours** is the fully loaded labor paid out to the technician compared with the revenue generated during billable service calls.

**Performance Indicator – Overall Blended Hours** is the same as the Performance Indicator – Overall Hours with the exception of the additional element of adding in the labor credits from performing scheduled maintenance agreements, thus the word "blended".

## ProfitSmart Performance

**Sales Leads –Overall** are the bona fide sales leads generated from all service calls. A bona fide sales lead is defined as the service technician educating and informing the homeowner about new high efficiency products and accessories versus the current repair being made, or the under-performing product and/or systems currently in place. Once the technician has educated and informed the customer and they are ready to learn more from a sales person, the service technician then contacts their company's sales coordinator and makes sure the homeowner has a sales appointment set *before* they leave the home

**Sales Leads – Old Equipment** is the same as Sales Leads – Overall except the opportunities are restricted to service calls where the equipment age is Old.

**Maintenance Agreements Sold – Overall** are the new maintenance agreements sold by the technician while on a service call.

**Maintenance Agreements Sold – Old Equipment** is the same as Maintenance Agreements Sold – Overall except where the equipment age is Old.



# Key Performance Indicators and Definitions

## Labor Leverage

**Manpower** shows the actual utilization of the technician.

**Billable Labor Ratio** is the ratio of time spent on billable service calls to all non-productive time.

**Percent Of Total Service Calls** and **Percent Of Total Travel Hours** together represent the *Travel Efficiency*. The properly traveling technicians will do a higher percent of the total service calls and use a lower percent of the total travel hours.

**First Time Completion Percentage** is the percentage of the time a technician completes a service call on the first visit.

**Call Back Percentage** is the percentage of their original service calls that resulted in a call back.

## SuperTech Contribution

**Total Points** is the number of points accumulated from the SuperTech 500 bonus system.

**Super Contribution** includes revenue generated from the sales of parts and labor on service calls, labor credits awarded from escrowed monies for performing maintenance agreement service calls and awarding credit to the technician for obtaining sales leads.