

Trades Business Marketing & Operations (Plumbing, Electrical, HVAC) — Workbook

This workbook turns the course into your shop's operating system. Work through each section to build a flat-rate price book, optimize your Google presence, tighten dispatching, and stand up a technician scorecard and review engine. Fill in real numbers from your own business, because the templates only pay off when they reflect your trucks, your market, and your costs.

Pricing the Job, Not the Hour

Replace hourly guessing with a true shop rate, target margins, and a unit-economics scorecard.

Worksheet: Calculate Your True Shop Rate

Pull your real annual numbers and work the break-even math from the course. Do not borrow a competitor's rate. Finish by setting a selling shop rate that includes your profit target.

Technician base wage per hour

Labor burden multiplier (1.25 to 1.40)

True labor cost per worked hour (base x burden)

Total annual overhead per truck (fuel, insurance, software, office, marketing, owner pay)

Billable hours per truck per day (be honest, usually 5 to 6)

Working days per year

Annual billable hours (hours/day x days)

Break-even shop rate ((overhead + annual labor) / billable hours)

Target net profit margin (10% to 20%)

Selling shop rate (break-even / (1 - margin))

Exercise: Build Three Flat-Rate Task Prices

Pick three of your most common jobs (for example a water heater swap, a panel upgrade, and a capacitor replacement). Price each using the four-part method: material x markup, plus labor units x selling shop rate, plus hard costs. Then compute the gross margin.

- For each task, what is your supplier material cost and what markup (2x to 3x) will you apply?

- How many standard labor hours does the task take, and what is the labor charge at your selling shop rate?

- What hard costs (permit, haul-away, disposal) must be added?

- What is the final flat-rate price and the blended gross margin, and does it clear your target?

Checklist: Flat-Rate Readiness Checklist

- Calculated true labor cost including the labor burden, not just the wage
- Totaled all annual overhead for at least one truck
- Used realistic billable hours per day (5 to 6), not the 8 the calendar shows
- Set a selling shop rate that includes a stated profit target
- Built flat-rate prices for the 30 to 50 most common tasks
- Chose a pricebook tool (Profit Rhino, ServiceTitan Pricebook Pro, or Housecall Pro flat-rate)
- Defined the four scorecard metrics: average ticket, close rate, revenue per truck per day, gross margin per job

Getting Found: Local SEO and Lead Generation

Optimize your Google Business Profile, build a converting site, and track every lead source.

Checklist: Google Business Profile Optimization

- Set the correct primary category (Plumber, Electrician, or HVAC contractor)
- Added all relevant secondary categories (water heater supplier, furnace repair service, etc.)
- Listed the full service area by city and county
- Wrote a keyword-rich description and filled every service and product with prices
- Uploaded 20+ real photos of trucks, uniforms, team, and completed work
- Turned on messaging and the booking button
- Confirmed name, address, and phone match the website and every directory exactly (NAP)
- Scheduled a weekly Google post with a seasonal offer or recent job

Worksheet: Lead-Source Tracking Setup

Map every way a customer can reach you to a tracked source so you can calculate cost per booked job per channel. Assign a call-tracking number to each channel and record the math monthly.

Channel name (GBP / Map Pack, LSA, Google Search ads, organic, yard signs, referrals)

Call-tracking number assigned (CallRail or WhatConverts)

Monthly spend on this channel

Leads received this month

Jobs booked this month

Cost per booked job (spend / jobs booked)

Average ticket from this channel

Decision: scale up, hold, or cut

Exercise: Plan Your Service-and-City Landing Pages

Organic ranking comes from dedicated pages for each core service in each town you serve. List your services and your service-area towns, then map out the unique pages to build.

- What are your 4 to 6 core services that deserve their own landing page?
- Which towns or suburbs in your service area should each have a page?
- Which 'service in city' combinations will you build first, and what unique copy will each have so it is not thin duplicate content?
- What trust signals (license number, years in business, star badge, real photos) will appear at the top of each page?

Dispatching, Scheduling, and Field Service Software

Match the right tech to the right job, cut windshield time, and run it all through one platform.

Worksheet: Zone and Capacity Map

Divide your service area into zones and assign a realistic daily job capacity to each, so the call taker can book geographically instead of scattering trucks across the map.

Zone name

Zip codes or neighborhoods included

Jobs a single truck can complete here per day

Assigned crew or technician

Arrival windows offered (e.g. 8-10, 12-2, 2-4)

Flex slots held for same-day emergencies

Current average drive-time ratio in this zone

Exercise: Diagnose Your Billable-Hour Efficiency

Pull last week's timesheets and job logs for one technician and calculate where the day actually goes. The goal is to push billable-hour efficiency to 60 percent or higher by cutting drive time.

- Of the paid hours last week, how many were actually billed to a job (billable-hour efficiency = billed / paid)?
 - How many hours were drive time, and what is the drive-time ratio (drive / total)?
 - Where did unbillable time go: driving, warehouse stops, write-ups, or waiting?
 - What two scheduling or dispatch changes would recover the most billable hours next week?
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Checklist: Field Service Software Selection and Rollout

- [] Matched the platform to truck count (Jobber for 1-5 trucks, Housecall Pro for small-mid, ServiceTitan for scaling shops)
- [] Confirmed it supports a flat-rate pricebook on a tablet
- [] Checked the accounting integration (QuickBooks via FieldEdge or ServiceFusion if needed)
- [] Loaded the flat-rate price book into the software
- [] Set up the live dispatch board showing every truck and next stop
- [] Turned on automatic review-request texts on job completion
- [] Confirmed the system logs source, revenue, and margin for the weekly scorecard

People and Reputation: Technicians and 5-Star Reviews

Recruit and retain technicians with the right pay and KPIs, and build a compounding review engine.

Worksheet: Technician Compensation Design

Design a pay structure that lets great techs earn well while tying part of pay to shop profitability, with guardrails against overselling.

Pay model chosen (hourly + spiffs, performance/commission, or hourly + commission hybrid)

Base hourly wage (if applicable)

Commission percentage on generated revenue (often 8% to 12%)

Spiffs or bonuses for specific items (maintenance plans, surge protectors)

Maintenance-plan enrollment bonus

Quality guardrail tied to pay (callback rate and average review rating)

Audit process for high-ticket jobs

Exercise: Set Up Your Review Engine

Systematize the review ask so it happens after every job automatically, then plan how you will respond to feedback. Treat review velocity as a marketing KPI.

- What tool will fire the automatic review request (NiceJob, Podium, or the FSM's built-in feature), and is the link one tap to your Google review box?

- What will technicians say at the end of each job to prime the customer for a review?

- What is your monthly review-velocity target given your job volume (e.g. 10 to 20 new reviews)?

- What is your written process and timeline for responding to negative reviews and moving resolution offline?

Worksheet: Technician Scorecard Targets

Define the target for each KPI on your technician scorecard so one-on-ones become coachable conversations against a clear number.

Revenue generated per day target

Average ticket target

Close rate target (aim 70%+)

Callback rate ceiling (keep low)

Membership / maintenance-plan conversions target

Average review rating target

One-on-one review cadence (weekly, biweekly)

Checklist: Hiring and Retention Checklist

- Keep a hiring page live and a candidate pipeline warm even when fully staffed
- Wrote the job ad around stability, good tools, respect, and a growth path, not just wage
- Launched an employee-referral bonus program
- Built a relationship with a local trade school or apprenticeship program
- Created a structured 30-60-90 day onboarding with ride-alongs and price-book training
- Defined a career ladder from apprentice to lead with pay and skill milestones
- Scheduled regular one-on-ones to surface problems before a good tech quits

Your Action Plan

1. Calculate your true shop rate and selling rate from your own annual numbers this week.
2. Build flat-rate prices for your 30 to 50 most common tasks and load them into a pricebook tool.
3. Fully optimize your Google Business Profile and fix NAP consistency across every directory.
4. Stand up call tracking so every lead is attributed to a channel and you can compute cost per booked job.
5. Build the first batch of service-and-city landing pages with unique copy and trust signals.
6. Turn on Google Local Services Ads and complete the Google Guaranteed verification.
7. Divide your territory into zones with daily capacity and switch to geographically efficient booking.
8. Choose and configure field service software sized to your truck count, and run every job through it.
9. Design a technician pay structure with KPIs and roll out a weekly scorecard one-on-one.
10. Automate a post-job review request and start responding to every review within two days.

