

Plumbing Business Operations — Workbook

This workbook turns the course into your plumbing company's operating system. Work through each section to build a flat-rate price book, stand up an emergency dispatch and on-call system, organize your van fleet and truck stock, and build a customer-acquisition engine with memberships and referrals. Fill in real numbers from your own business, because the templates only pay off when they reflect your trucks, your market, and your costs.

Flat-Rate Pricing That Protects Your Margin

Replace hourly guessing with a true shop rate, four-part task prices, 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.

Plumber 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 van (fuel, insurance, truck payment, software, office, marketing, owner pay)

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

Working days per year

Annual billable hours (hours/day x days)

Annual burdened labor cost (true labor cost x annual billable hours)

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

Target net profit margin (10% to 20%)

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

Exercise: Price Three Flat-Rate Plumbing Jobs

Pick three of your most common jobs (for example a water heater changeout, a toilet pull-and-reset, and a main-line stoppage clearing). Price each using the four-part method: material x markup, plus labor hours x selling shop rate, plus hard costs at cost. Then compute the gross margin.

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

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

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

- What is the final flat-rate price and the gross margin, and does it clear your 50 percent 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 van including owner pay
- 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 plumbing 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

Emergency Dispatch and After-Hours Calls

Stand up an intake script, profitable after-hours pricing, and a fair on-call rotation backed by software.

Worksheet: Build Your After-Hours Pricing

Set the fees and multiplier that make emergency work profitable. Then run one worked example so the on-call plumber and the phone answerer quote the same numbers.

Daytime trip or diagnostic fee (waived if job is booked? yes/no)

After-hours dispatch fee (rarely waived)

Emergency labor multiplier for nights/weekends/holidays (1.5x to 2x)

On-call standby stipend per week for carrying the phone

Overtime rate for a call actually run (e.g. 1.5x)

Committed response window (e.g. within 90 minutes)

Example job: daytime flat-rate price

Example job: after-hours price (labor x multiplier + dispatch fee)

Exercise: Write Your Emergency Call Intake Script

Draft the word-for-word script whoever answers the phone will use on a 2 am emergency. The goal is to reassure, capture, confirm, and book before the homeowner calls the next plumber.

- What is your opening line to reassure the caller and tell them how to shut off the water?

- Which essentials do you capture (name, address, phone, one-line problem) and in what order?

- How and when do you state the after-hours dispatch fee so there is no surprise on the invoice?

- What arrival window do you promise, and what confirmation text do you send to stop them shopping?

Checklist: Emergency Dispatch Setup Checklist

- Wrote and posted a standard emergency intake script for whoever answers the phone
- Set up live answering or an after-hours queue that reaches a person, not voicemail
- Published an on-call rotation at least a quarter ahead
- Defined standby stipend plus overtime pay for on-call plumbers
- Defined what counts as a true emergency versus a next-day call
- Built emergency job types in software with the trip fee and labor multiplier pre-loaded
- Turned on automated booking-confirmation and on-the-way customer texts
- Set a monthly review of after-hours revenue against standby pay spent

Fleet and Truck-Stock Management

Design one-trip truck stock, replenish on par levels, and use cost-per-mile to make fleet decisions.

Worksheet: Design Truck Stock for the One-Trip Job

Start from your top 20 tasks and build the standard stock list for one van. Set a par level for each item so restocking becomes a routine, not a scramble.

Top 20 tasks this van runs most often

Common parts each task consumes (fittings, wax rings, supply lines, shutoff and fill valves, pipe sizes)

High-frequency big items to keep in the warehouse for same-day swaps (e.g. 40/50 gallon heater)

Par level (minimum quantity) for each stocked item

Bin or shelf location for each part (Adrian Steel, Ranger Design, Weather Guard, or other)

Restock cadence and day (e.g. weekly Monday morning to par)

Person responsible for the weekly restock

Exercise: Calculate the Cost of a Supply-House Run

Quantify what an unstocked van really costs you, then decide which parts must always be on the truck to prevent it.

- What is your selling shop rate per hour, and how long is a typical round trip to the supply house?

- What is the lost billable value of one mid-job supply run, and what does two per day cost over a week?

- Which five parts cause the most mid-job runs today, and what par level would end them?
- What does the homeowner experience when a plumber drives away mid-job, and what is that worth?

Worksheet: Cost-Per-Mile and Replace-Versus-Repair

Run the cost-per-mile math on your oldest van and compare it against a replacement so the fleet decision is made on numbers, not nostalgia.

Van identifier and current odometer

Annual payment or depreciation

Annual fuel cost

Annual insurance cost

Annual repairs and maintenance cost

Miles driven this year

Cost-per-mile (total annual cost / annual miles)

Estimated revenue lost to breakdowns this year

All-in cost-per-mile of a comparable replacement van

Decision: keep and maintain, or replace

Checklist: Fleet and Inventory Checklist

- [] Built a standard truck-stock list from the top 20 tasks
- [] Set a par level and a fixed location for every stocked part
- [] Established a fixed weekly restock-to-par routine
- [] Tied parts used to tickets so missed charges and shrinkage surface
- [] Adjusted par levels seasonally (heater and frozen-pipe parts before winter)
- [] Put each van on a preventive-maintenance schedule with a daily driver walk-around
- [] Tracked odometer, fuel, and repair spend per van
- [] Calculated cost-per-mile and set a replace-versus-repair trigger

Customer Acquisition and Recurring Revenue

Rank locally, convert customers into members, and build a tracked referral and acquisition pipeline.

Checklist: Google Business Profile and Local Search Checklist

- Claimed and verified the Google Business Profile with exact name, address, and phone
- Set Plumber as primary category and added relevant secondary categories
- Listed all services and real service-area zip codes
- Added real photos of trucks, team, and completed work, and post updates regularly
- Made name, address, and phone identical across every online listing
- Set up a review-request automation that texts a direct review link at job completion
- Respond to every review, positive and negative, in a calm professional tone

Worksheet: Design Your Service Membership

Build a plumbing membership you can sell at the kitchen table after a successful repair. Price it so it wins for both the homeowner and the shop.

Membership price (monthly and/or flat annual)

Annual inspection scope (whole-home check, water heater flush, shutoff checks)

Priority scheduling benefit (especially during freeze events and holidays)

Standing repair discount (e.g. 10 to 15 percent)

Dispatch or diagnostic fee treatment for members (waived or reduced)

Transferable-on-home-sale benefit (yes/no and terms)

Target member count for year one

Target annual renewal rate

Exercise: Calculate Cost of Acquisition by Channel

Tag where customers come from and work out what each channel costs versus what a customer is worth, so you can shift budget to what pays.

• Which channels bring you customers (Google search, Google Ads, referral, repeat, membership)?

• What is each channel's total monthly spend including ad budget and tool or agency fees?

• What is the cost of acquisition per channel (spend / new customers)?

• How does each channel's acquisition cost compare to first-job value and to lifetime value, and where should you shift budget?

Checklist: Referral and Pipeline Checklist

- Ask for referrals at the end of every job that went well
- Made referring easy with a card or a tap-to-share link
- Reward both the referrer and the new customer to keep the loop active

- [] Built referral relationships with real estate agents, property managers, and HVAC/remodeling firms
- [] Tag every new lead with its source in your software
- [] Review cost of acquisition and lifetime value monthly and reallocate budget

Your Action Plan

1. Run the True Shop Rate worksheet with your real annual overhead and set a selling shop rate that includes profit
2. Build flat-rate prices for your 30 to 50 most common plumbing tasks in a pricebook tool
3. Stand up the four-metric scorecard (average ticket, close rate, revenue per truck per day, gross margin) and review it weekly
4. Write and post an emergency intake script, then set after-hours dispatch fees and a labor multiplier
5. Publish an on-call rotation with standby and overtime pay, and configure an after-hours queue in your software
6. Build a standard truck-stock list with par levels and start a fixed weekly restock-to-par routine
7. Put every van on a preventive-maintenance schedule and calculate cost-per-mile to flag replacements
8. Fully optimize the Google Business Profile and turn on automated review-request texts
9. Design and start selling a service membership at the kitchen table after successful repairs
10. Tag every lead source, calculate cost of acquisition by channel, and shift budget toward the best return

