Revenue Leak Audit

HVAC Co XYZ | Customer Experience + Operations

Public-facing sample only. Internal performance, financial data and staff workflows were not reviewed. Financial figures below are illustrative benchmark scenarios, not Company XYZ actual results.

THE OPPORTUNITY

Strong technical service. The visible risk appears to sit around the service.

Appointment ownership, proactive updates and service recovery are the clearest opportunities to protect booked revenue, referrals and customer trust.

$55.4K

illustrative annualized exposure

if a 3-opportunity monthly pattern repeats at a 50% close rate

EXECUTIVE SNAPSHOT

STRONGEST ASSET

Technical credibility

Customers repeatedly praise knowledge, professionalism and explanations.

PRIMARY LEAK

Appointment reliability

Missed or mixed-up appointments and follow-up gaps appear in public feedback.

FASTEST WIN

Proactive status updates

Tell the customer before they need to chase the business.

3 PRIORITY REVENUE LEAKS

PRIORITY	LEAK	SIGNAL	BUSINESS EFFECT	FIX
P1	**Appointment ownership**	Missed/mixed-up appointments appear in public feedback.	Urgent leads may move on; staff absorbs avoidable rework.	One owner + status + arrival window + next action.
P1	**Status communication**	Some customers report having to call for updates.	Trust drops before the technician ever arrives.	Delay/reschedule triggers + written confirmation.
P1	**Service recovery**	One visible issue required escalation to recover.	A fixable error can become a bad review or lost future work.	Acknowledge -> own -> recover -> escalate -> close the loop.

ILLUSTRATIVE REVENUE OPPORTUNITY

3	$9.2K	$4.6K	$55.4K
missed opportunities / month	gross opportunity value	modeled monthly exposure @ 50% close	annualized if the pattern repeats

Scenario math: 2 repair opportunities at $394 + 1 replacement opportunity at $8,445. **A paid audit replaces market assumptions with the client's actual response rate, close rate, average ticket and missed-opportunity count.**

What to fix first

01

Assign appointment ownership

HIGH IMPACT

LOW-MED EFFORT

Every booking and schedule change has one accountable owner.

02

Install delay + reschedule triggers

HIGH IMPACT

LOW EFFORT

Customers hear from the business before they have to chase it.

03

Standardize service recovery

HIGH IMPACT

LOW EFFORT

Mistakes become controlled recoveries instead of reputation damage.

30-DAY QUICK-WIN ROADMAP

DAYS 1-7	**MAP + BASELINE**	Map lead -> booking -> dispatch -> completion. Name owners. Capture response times, missed/rescheduled appointments and callback closure.
DAYS 8-14	**INSTALL COMMUNICATION RULES**	Standardize confirmations, reminders, delay alerts, rescheduling and callback language. Add simple automation where useful.
DAYS 15-30	**RECOVER + MEASURE**	Install a short recovery SOP and escalation rule. Track whether communication-related complaints and follow-up gaps fall.

WHAT THE PAID AUDIT ADDS

01 Actual revenue exposure model
Built from your real close rate, ticket values and missed-opportunity volume.

02 Customer-journey leak map
Shows where leads, handoffs, follow-up and recovery actually break down.

03 Prioritized fix plan
Ranks changes by revenue/customer impact and implementation effort.

04 30-day operating plan
Clear owners, communication standards, measurement and next actions.

Want this built around your actual numbers and workflow?

Founding-client Revenue Leak Audit

A focused diagnostic + prioritized operating plan. No generic AI report.

$750

flat founding rate

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Helping service businesses identify & resolve customer-experience and operational revenue leaks.