

14-Day Shadow Audit

We observed your operational stream silently for 14 days. We didn't talk to your customers, change any settings, or touch your tools. We listened to call recordings, read the calendar and FSM, watched dispatch decisions, and cross-referenced them.

| | |
|---------------------|---|
| Prepared for | Northgate Plumbing Co. (anonymized) |
| Trade / size | Residential plumbing · 6 techs · 2 CSRs · 1 dispatcher |
| Observation window | 14 days (two full work weeks) |
| Calls observed | 198 inbound · 96 outbound |
| Bookings observed | 146 |
| Dispatches observed | 132 |

\$18,400

in preventable revenue impact identified in 14 days — from 31 handoff failures nobody saw.

The biggest leak was not missed calls. It was dispatch accuracy — the right job going to the wrong-skilled tech. That is why this report opens there, not on missed calls. Missed calls are real, but they are the smallest line in your leak and the most solved problem in the trade.

SECTIONS — ORDERED BY DOLLAR IMPACT

| | |
|---|---------|
| §1 Dispatch Accuracy | \$7,100 |
| §2 Estimate Rot | \$3,600 |
| §3 Booking Accuracy | \$2,850 |
| §4 Repeat Callers / Unresolved Issues | \$2,100 |
| §5 Buried Complaints | \$1,500 |
| §6 Missed Calls | \$1,250 |
| §7 The Single Costliest Incident — Walked Through | \$4,200 |
| §8 Three Quick Wins + Why They're Not Enough | |

Note: §7's \$4,200 incident is already counted inside §1. It is broken out separately so you can see how a single handoff failure cascades through multiple surfaces.

Dispatch Accuracy

Problem described vs. tech sent

Dispatches in window: 132

Tech-vs-problem mismatches caught: 6

Reached the customer (truck rolled wrong): 4

Caught at the desk before truck rolled: 2 (good catches — your dispatcher re-routed these; noted so you know the desk is already doing some of this manually)

Estimated revenue impact: \$7,100

We cross-referenced every dispatched job where the call described a problem needing a specific skill (sewer camera, gas certification, leak detection, tankless sizing) against the tech who was actually sent.

| # | DAY | CUSTOMER DESCRIBED | WHO GOT SENT | OUTCOME | IMPACT |
|---|-----|--|--|--|----------------|
| 1 | 6 | Recurring sewer smell, drains slow all over, water pooling by cleanout | Drain-clearing tech (no camera, no excavation) | Snaked a partial clog, called it fixed. Collapsed lateral. Recurred Day 12 — job walked to a competitor. SEE §7 | \$4,200 |
| 2 | 3 | Water heater leaking from the bottom | Tech routed as "no hot water" — arrived with wrong parts | Returned next day with right tank; second truck roll | \$750 |
| 3 | 8 | Gas smell near water heater | General plumber, no gas cert | Could not legally touch gas line. Customer told to wait; rebooked 2 days out | \$950 |
| 4 | 10 | Wet spot spreading across the slab | Drain tech, no acoustic leak-detection gear | Couldn't locate leak. Returned next day with equipment | \$600 |
| 5 | 11 | Want to replace tank with tankless | Tank-swap tech, thin tankless experience | Quoted hesitantly; estimate stalled, customer "needs to think about it" | \$600 |

A missed call costs you one lead. A dispatch mismatch costs you the truck roll *and* the job *and* often the customer — because by the time it surfaces, the customer has already paid for something that didn't work.

RECOMMENDED CHANGES (EACH DOABLE WITHOUT BUYING ANYTHING)

1. **One-line tech-skill grid at the dispatch desk.** Six techs, four skill columns (sewer camera, gas cert, leak detection, tankless). Glance before assigning.
2. **"Describe-the-symptom" tag on every booking.** CSR tags drain / water-heater / gas / leak / sewer / install. Dispatch routes off the tag, not the first available truck.
3. **Closeout recommendations become tasks.** When a tech writes "recommend camera if it recurs," that line auto-creates a follow-up task instead of dying in a note. This one change alone would have saved the \$4,200.

Estimate Rot

Quotes sitting with no follow-up

Pending estimates: 23

Older than 14 days with no follow-up: 9

Total dollar value sitting un-followed-up: \$14,300

Realistic recovery (industry benchmark 20–35%, used 25%): \$3,600

\$14,300 is sitting in your pipeline right now with no one touching it. If you made 9 phone calls this afternoon, industry benchmarks suggest you'd close \$3,600 of it. This is the cheapest dollar in the entire report to recover.

RECOMMENDED CHANGES

1. **Day-7 estimate follow-up auto-task** in your FSM (any FSM can do this).
2. **Day-14 "are you still weighing it?" outbound call** — second touch before the estimate dies.

Booking Accuracy

What the customer said vs. what got booked

Booking-actionable calls: 121

Matched correctly: 115 (95%)

Mismatched: 6 (5%)

Estimated revenue impact: \$2,850

| # | DAY | CUSTOMER SAID | WHAT GOT BOOKED | IMPACT |
|---|-----|-------------------------------------|---|---------------------------|
| 1 | 2 | "Wednesday afternoon, after 3" | Wednesday 9am | \$500 NOT HOME |
| 2 | 5 | "Kitchen drain backing up" | Booked as water-heater inspection | \$950 CHURN RISK |
| 3 | 9 | "Two bathrooms — upstairs and hall" | Booked as single-fixture job; 1-hr slot | \$600 RETURN VISIT |
| 4 | 13 | "Just a faucet cartridge" | Booked as full faucet replacement | \$800 WRONG PARTS |

RECOMMENDED CHANGES

1. **End-of-call read-back** of date + time + service type by the CSR (catches ~80% of these).
2. **60-second booking-confirmation SMS** the customer can correct (catches most of the rest).

Repeat Callers / Unresolved Issues

Customers who called 3+ times in 14 days about the same topic with no recorded resolution

Customers calling 3× on one topic: 3

Unresolved at window end: 3

Estimated revenue impact: \$2,100 (lost LTV × frustration–churn probability)

| # | CUSTOMER | 1ST CALL | # CALLS | TOPIC | STATUS AT WINDOW END |
|---|----------|----------|---------|---|------------------------------------|
| 1 | R.M. | Day 6 | 3 | Sewer backup (the \$7 incident) | Lost to competitor |
| 2 | T.G. | Day 4 | 4 | Running toilet, "still not right after the visit" | Pending; last call Day 12 |
| 3 | L.A. | Day 7 | 3 | Recurring kitchen drain clog | One visit; customer says not fixed |

RECOMMENDED CHANGE

1. **Repeat-caller flag at the 2nd call** on the same number/topic that routes to the manager — before the customer churns.

Buried Complaints

Dissatisfaction patterns inside normal-looking calls

Calls/texts with buried complaint patterns: 4

Estimated revenue impact: \$1,500 (review-rating risk × probability of public review)

| # | DAY | CHANNEL | WHAT THEY ACTUALLY SAID | WHY FLAGGED |
|---|-----|---------|--|--|
| 1 | 5 | Call | "It's fine, I guess... we'll see if it holds" | Quiet dissatisfaction; no follow-up logged |
| 2 | 9 | Text | "This is the second time someone's been out for this" | Repeat-visit frustration; review risk |
| 3 | 12 | Call | "Last time it took a while to get someone back" | Reference to a prior slip; churn cue |
| 4 | 13 | Call | "I just want to make sure it's actually fixed this time" | Trust erosion; at-risk relationship |

RECOMMENDED CHANGE

1. **48-hour outbound follow-up** on any flagged interaction, plus a one-page CSR cue-sheet for recognizing complaint signals (we provide it).

Missed Calls

Table stakes — the most solved problem in the trade

Inbound calls: 198

Missed (no answer): 18

Of those, no callback within 1 hr: 5

Estimated revenue impact: \$1,250

This section is intentionally short. There are 15+ tools that catch missed calls (AI receptionists, missed-call-text-back, AnswerForce, and so on) — that problem is effectively solved, and it's the smallest line in your leak. If a one-line missed-call rescue is genuinely all you need, we'll happily point you to a \$99/mo tool that does it.

The reason FixOps exists is everything in §1–§5.

The \$4,200 Job That Walked Away

Customer: R.M. (redacted) · **Day 6** · inbound call 8:11am

Outcome: lost the repair job to a competitor; recurring-revenue customer gone

Total dollar impact: \$4,200 (the walked job) + \$385 refund/goodwill exposure

Day 6, 8:11am

Call: "There's a sewer smell, drains are slow all over the house, and there's water pooling by the cleanout out front."

Symptom set = main-line / lateral problem. Needs a sewer-camera-capable tech.

Day 6, 8:14am

Dispatcher note in FSM: "drain clog — send next avail."

Tagged as routine clog. No skill check.

Day 6, 1:40pm

Drain tech runs a cable, clears a partial blockage, charges \$385. Closeout note: "Cabled main line, partial clear. Recommend camera if it comes back."

The right recommendation — but it stayed a note. No task, no follow-up to dispatch.

Day 12, 7:50am

Sewage backs up worse. R.M. calls; the call reaches a tech's cell and is never logged in the FSM.

Repeat-caller signal #1 — invisible to the office.

Day 13, 12:15pm

R.M. calls again; lands in lunchtime voicemail. No callback that day.

Repeat-caller signal #2 + missed callback. Recovery window closing.

Day 14

R.M. hires a competitor. They camera the line, find a collapsed, root-intruded section, and do a \$4,200 spot repair + liner.

Job lost. Customer lost. \$385 now a refund/review liability.

Where each FixOps surface would have caught this

| SURFACE | WHEN | WHAT IT SAVES |
|------------------------------|--|--|
| Dispatch accuracy (§1) | At 8:14am dispatch — "recurring + pooling at cleanout" routes to camera-capable tech | The whole incident. The \$4,200 job is yours. |
| Closeout-to-task (§1 rec #3) | Day 6, 1:40pm — tech's "recommend camera" becomes a follow-up task | Proactive callback before it recurs |
| Repeat-caller (§4) | Day 12, first repeat call | Manager calls R.M. back personally; recovery window still open |
| Missed-call (§6) | Day 13 voicemail with no callback | A same-day callback instead of silence |

Four separate surfaces each had a clean shot at this one incident. None of them was a tooling problem or a bad tech — every failure was a handoff that nobody owned.

What was clean

- ✓ Your CSRs' phone manner was consistently professional — warm, patient, knowledgeable.
- ✓ When your CSRs did catch a missed call, average time to return it was 14 minutes — well above industry norms.
- ✓ Tech closeout notes were more detailed than the majority of shops we observe.

This isn't a people problem. Your team is good. The gaps are in the handoffs between them.

Three Quick Wins You Can Make Today

These are the low-hanging fruit — simple process fixes that address the most obvious failures we found:

1. Closeout recommendations become tasks

When a tech writes "recommend X if it recurs," it auto-creates a follow-up task.

Time: ~0 (FSM rule). **Tools:** existing. **Recoverable:** ~\$4,200 in this window.

2. Four-column tech-skill grid + symptom tag on bookings

Route off the symptom, not the next free truck.

Time: ~1 hr to build, then glance-only. **Tools:** existing. **Recoverable:** ~\$2,900/window in avoided wrong-skill truck rolls.

3. Day-7 estimate follow-up auto-task

Touch every pending estimate before it rots.

Time: ~0 (FSM rule). **Tools:** existing. **Recoverable:** ~\$3,600 of pending estimates at 25% close.

But here's the thing

These three fixes catch the *obvious* failures — the ones we could show in a clean table. They're worth doing. Do them.

What they don't catch is the **compounding pattern underneath**. In 14 days we saw failures that no single process change can address:

- A customer's tone shifted across three calls over a week — from patient to curt to gone. No single call sounded like a complaint. The pattern was only visible across all three.
- A tech's recommendation sat in a closeout note while the same customer called the office twice — and neither your CSR nor dispatcher knew the note existed, because it was in a different screen in a different tool.
- A dispatch decision that looked fine in isolation only became a mismatch when cross-referenced against what the customer actually said on the call 40 minutes earlier.

These aren't fixable with a grid on the wall or an FSM rule. They require continuous, cross-system monitoring — comparing what was *said* on the phone to what was *entered* in the booking to what was *dispatched* to what the tech *actually did*. That chain breaks in ways that are different every time. A person can't watch all of it. That's what FixOps does.

This report is a snapshot. FixOps is the system.

This audit covered 14 days and caught 31 failures. But these failures aren't a one-time event — they happen every week, in different combinations, across different jobs. New techs join. CSRs have off days. Dispatchers get slammed at 8am on Monday. The leaks move around.

FixOps running live on your operations catches each failure in real time — the dispatch mismatch at 8:14am, the sentiment shift on a call at 2pm, the rotting estimate at Day 7, the cross-system contradiction between a call transcript and a booking entry — and surfaces it before it costs you money. No dashboards to check. No reports to read. Just a flag: *this is about to go wrong, here's what to do.*

If you'd like to run FixOps live for a free month — no card, no commitment — just reply to the email this report came in on. If not, keep the report, make the three quick fixes, and reach out anytime.

— Amit · FixOps
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APPENDIX — HOW WE CALCULATED THE DOLLAR FIGURES

We never guess a revenue number. Every figure above uses a documented method:

- **Dispatch mismatch:** wasted truck-roll cost (\$150–\$250 fully loaded) + (lost-job probability × job value). Row #1 is a confirmed loss of a \$4,200 job; others use truck-roll + partial loss estimates.
- **Booking mismatch:** wasted truck-roll cost + (job value × churn probability, default 15%).
- **Repeat caller:** customer lifetime value × frustration-churn probability (default 30% by the 3rd call).
- **Buried complaint:** review-rating revenue impact × probability of a public review (Yelp/Google studies: ~3–5%).
- **Estimate rot:** 25% recoverable × dollar value of the pending estimate (conservative end of the 20–35% benchmark).
- **Missed call:** average job value × probability the missed caller was a job × no-recovery rate.

If a surface had returned zero findings, we would have said so plainly — that builds the trust that makes the report worth acting on.