BEFORE THE WORKSHEETS

Free isn't free.

Some owners won't touch a lead service because it charges. Who cares what it charges? The question is what it gives back. And the free stuff isn't free. The networking breakfast, the door knocking, the posting every night: you pay for all of it with hours.

ROES

Return on Effort Spend

ROAS sees your ad dollars. ROES sees your dollars and your hours.

Real cost = dollars spent + (hours × what an hour is worth)

ROES = gross profit ÷ real cost

Under 1x
It's costing you money. Fix it or stop.

1x to 3x
It's working. Keep it and make it better.

3x or more
Double down. Move money and hours here.

EXAMPLE MONTH, WITH AN HOUR WORTH $100

CHANNEL	DOLLARS	HOURS	REAL COST	GROSS PROFIT	ROES	CALL
Lead service	$1,000	5	$1,500	$4,800	**3.2x**	**Double down**
Networking group	$100	16	$1,700	$2,000	**1.2x**	**Make it better**
Door knocking	$0	20	$2,000	$1,600	**0.8x**	**Fix or stop**

The one that charges is the winner. The one that felt free is losing money.

Use gross profit, not sales.
$2 back in sales at a 40% margin is 80 cents of profit for every $1 in. That's a loss.

Give slow channels 90 days.
Referrals and partners are seeds, not fruit. Don't pull them up before they grow.

Give an hour one price.
Use what you'd pay someone to do that work, and use it for every channel.

Hand off the effort.
A channel that's 1× on your hour can be 3× on someone else's.

You don't judge a workout by whether it was free. You judge it by whether it made you faster.

THE MULTIPLIER

Measure it. Scale it.

Word of mouth is great, but you can't turn it up or see where it came from. Ads you can: put more in, get more back, and see exactly what came back.

	EASY TO SCALE	HARD TO SCALE
EASY TO MEASURE	**×1.5** Paid ads, LSAs, lead services	**×1.25** A networking group you track
HARD TO MEASURE	**×1.25** Truck wraps, billboards, radio	**×1** Word of mouth

Measurable: you can count the leads and the jobs it brought.

Scalable: put in more money or hours and it brings more, without you doing it yourself.

Growth score = ROES × multiplier The top score gets the next dollar and hour.

THE EXAMPLE MONTH, RANKED, WITH REFERRALS ADDED

CHANNEL	ROES	MEASURABLE	SCALABLE	MULTIPLIER	GROWTH SCORE
Lead service	3.2x	Yes	Yes	×1.5	**4.8**
Referrals	4.0x	No	No	×1	**4.0**
Networking group	1.2x	Yes	No	×1.25	**1.5**
Door knocking	0.8x	Yes	Yes	None	**Under 1x: fix or stop**

Under 1× gets no multiplier. Losing money is losing money, however easy it is to scale.

Earn the multiplier. Ask every lead how they heard about you and give each partner a code: now referrals are measurable. Ask every happy customer for a referral, with a thank you: now they're scalable. 4.0× times 1.5 is 6.0, your best channel.

Word of mouth is a gift. A referral system is a business.

WORKSHEET 1

Where your leads come from

Name every source you have today. Use the same names every month on worksheet 2, so the numbers line up.

Referrals
Past customers, friends, your crew

Paid ads
Google Ads, Local Services Ads, Meta

Lead services
Angi, Thumbtack, HomeAdvisor

Channel partners
Other trades, BNI, realtors, adjusters

Organic and social
Google profile, website, AI, social

Outbound and direct
Cold calls, direct mail, door knocking

Repeat customers
Service plans and return customers

Other
Anything else, or you don't know yet

Ask every lead: "How did you hear about us?" Write down their answer, even when your tracking says something else. Tracking misses word of mouth.

Where they came from isn't how they reached you. Someone can see your yard sign, Google you, then call. Source: yard sign. Reached you by: phone. Worksheet 3 tracks the second part.

WORKSHEET 2

Your monthly numbers, by channel

One sheet per service, every month. Fill in the white rows. The green rows are the math.

Service _____ **Month** _____ **An hour is worth $** _____

Number	Referrals	Paid ads	Lead services	Partners	Organic	Outbound	Repeat	Other	Total
Spend ($)									
Hours spent									
Impressions									
Leads									
Junk leads									
Appts booked									
Appts held									
Cancels									
No shows									
Estimates given									
Closed jobs									
Revenue ($)									
Job costs ($)									
Multiplier ×1, ×1.25 or ×1.5									
Close rate closed ÷ held									
Average job revenue ÷ closed									
Gross profit revenue – costs									
Margin profit ÷ revenue									
Cost per lead spend ÷ leads									
CAC spend ÷ closed									
Real cost spend + hours × $									
ROES profit ÷ real cost									
Growth score ROES × multiplier									

Appts are appointments. Held means it actually happened. Count a lead once, under the source the customer gave you. Leave impressions blank where a channel can't measure them. Job costs are materials, labor, subs, permits and equipment. ROES and the multiplier are on pages 20 and 21: under 1× ROES, fix it or stop.

WORKSHEET 3

How they reached you, and what got away

How they reached you

Month _____

The first way they contacted you	Leads	Booked	Closed	Avg reply time
Phone call				
Form on your website				
Form on an ad landing page				
Text message				
Chat on your website				
Direct message on social				
Google profile message or booking				
Email				
In person or partner handoff				
Total				

What got away, and why

Reason	How many	Est. value ($)	What we change next month
Price			
Timing, not ready yet			
Went with a competitor			
Financing declined			
Not a fit for us			
Never answered our follow up			
Cancelled or didn't show			

Average days from lead to signed job

_____

New customers who added a service plan

_____

Referrals from this month's customers

_____