



PGP - AI

Operational Review — A sample

An HVAC company

THIS IS A SAMPLE

The company below does not exist. We built it out of how small service companies actually run.

We show it because it is hard to picture what an “operational review” is until you hold one. This is what lands in your inbox.

Company	HVAC contractor, 18 people, Broward County
What we looked at	Finished service call → invoice out the door
Written by	Jay Weberbauer

The short version

Your techs finish a job. Eleven days later the customer gets a bill.

The actual work in between is about ten minutes.

At your volume, that eleven days means **\$63,000 of work you already did is sitting outside your bank account** — all the time, every day of the year.

You haven't lost it. You're just always eleven days behind on getting it.

Two changes fix most of it. Neither one costs money. The first one you can do Monday.

1 · What happens now

Tech finishes the call. Writes the ticket in the truck, or at the next stop, or at home that night. Tickets are due Friday. Some show up Friday.

Denise types each one into QuickBooks and sends the invoice. Four or five minutes a ticket.

If the ticket is missing the model and serial, or the parts just say “*capacitor*” with no number, or there's no signature — she can't invoice it. It goes on the clipboard on the wall until she can get that tech on the phone. He's on a roof. It sits.

That clipboard is the biggest thing in this review

It's the only record anywhere in your company of **work you did that nobody has billed yet.**

Nobody knows what's on it. You said it's thick.

Your receivables report doesn't show it. Nothing shows it. That money isn't late — it hasn't even been asked for yet.

And the best thing in this whole intake was something you did yourself. We asked how long tickets sit. You figured two or three days. Then you pulled twenty at random and counted. Eleven.

Nobody told you that. You went and looked. That's the hard part and you already did it.

2 · Where the time actually goes

Three different things are happening and only one of them is work.

The work — 10 minutes

Five minutes for the tech to write it. Four or five for Denise to type it.

The typing — 465 hours a year

6,200 calls × 4.5 minutes = **465 hours**

That's **twelve weeks** of somebody's full-time job, spent typing what is already written on paper in the same building.

That's not Denise being slow. The information gets written down twice and neither time is wrong.

The waiting — the expensive one

Service calls a year	6,200
Average ticket	\$340
That's a year of service work	\$2,108,000
Per day	\$5,775
× 11 days	\$63,529

What that number means: at any moment, about \$63,500 of finished work is waiting to be billed. Not late — unbilled. The line never clears, so the money never catches up.

Get it from eleven days to three and about \$46,000 shows up once and stays.

Why summer feels tight

You said summer is your best season and also the one where cash is tightest. This is why.

Your biggest month is the month you're furthest behind on billing. **The better the month, the bigger the hole.**

Nobody at your company is in charge of those eleven days. That's exactly why they've been there for years.

3 · What to change

First — tickets come in daily. Not Friday.

Tech takes a photo of the ticket with his phone at the end of the call and sends it.

Same paper. Same handwriting. Same five minutes. The only thing that changes is **when he lets go of it.**

This alone takes you from eleven days to about three. No app, no software, no training.

How you say it to the old guys matters more than the change.

You told us two of your senior techs worked for your dad, and if it feels like you're checking up on them it'll go sideways. They're not wrong to feel that.

So don't say it that way. Say this:

"You don't have to remember to bring them in anymore. Snap it and forget it."

That's true, and it takes something off their plate instead of adding to it.

Then — four fields, and say why

A ticket isn't done until it has:

1. **Model**
2. **Serial**
3. **Parts, with part numbers**
4. **Signature**

Same ticket. Those four moved to the top and marked required.

Next to the serial number, print one line: *this is what pays the warranty claim.*

A guy who knows why a box exists fills it in. A guy who thinks it's paperwork doesn't — and honestly, he's being reasonable. That one line is the whole difference.

Where AI comes in — and it's a small job, not a big one. A tool can read the photo of the ticket and fill in the QuickBooks entry. Denise reads it and approves it. Four and a half minutes of typing becomes under a minute of checking. That's most of those 465 hours back.

ONE RULE: NOTHING GOES OUT WITHOUT DENISE.

Not because the tool can't handle a service ticket. Because the habit of one named person checking is what keeps you safe later, when somebody suggests using the same trick on something that actually matters.

The ticket is just where you build the habit.

Later — put a number on the clipboard

Once tickets come in daily with the four fields, the clipboard mostly empties itself.

Whatever's left, count it once a week. Two numbers on the whiteboard: **how many tickets, how many dollars.**

Not a system. A number, on a wall, that somebody says out loud on Monday.

Don't build anything here until the first two are running.

Do this Monday

Count the clipboard. How many tickets, how much money.

Twenty minutes. Costs nothing. Tells you something no report you run right now can tell you.

4 · What we'd leave alone

You calling the customer yourself when a system you touched goes down again. Same day, you said. That's not a gap in your process — that's why those people call you next time. Don't automate it, don't hand it off.

Your techs' call on repair versus replace. You said you don't want a computer telling somebody their compressor is shot when it isn't, because it's your name on the truck.

You're right, and we'd write that into your AI policy as a hard line. There is software that pushes techs toward the bigger sale. It exists, people sell it, and it would make you money for about two years. We wouldn't build it and we'd tell you not to buy it.

Not hiring a tech you haven't watched work. It slows your growth and you know it. It's also why your callbacks are low. That's a trade you made on purpose. Not ours to undo.

5 · What we couldn't tell from here

The warranty money. You think you eat a few thousand a year in compressor claims you can't file because nobody wrote the serial down. You're probably right — **but we're not putting a number in here that you can't go check yourself.**

How to find the real one: pull last year's compressor purchases out of QuickBooks. For each one, see if a serial got written on the ticket. **One afternoon.** Either it's nothing and you forget it, or it's big enough that the four-field ticket pays for itself in three months.

Whether eleven days is your normal or your summer. Your twenty tickets were random, but we don't know what months. If they were August, your year-round number is better and your summer number is worse. Twenty minutes to check. Doesn't change what to do first either way.

Change-outs. You said that side is worse and you picked the easy one on purpose. We didn't look at it at all. That's a separate review and it's probably the one worth more.

What happens after the invoice goes out. We looked at everything before the bill. Collecting on it is a different problem and nothing above tells you anything about it.

The first change costs you nothing and doesn't need us. Do it Monday either way.

The second one we'd be glad to build properly if you want it. Either way this review is done and you don't owe us anything.

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What we worked from

Everything above came out of the form below. No meeting. No site visit. He wrote it in about twenty-five minutes.

We're showing you his answers so you can see two things: how much a good review needs, and how rough it's allowed to be.

His words, as written.

The business

1 • How many people, and who does what? 9 service techs, 2 install crews of 2, so 13 in the field. Office is Denise who runs everything, Carla on the phones, my sister does the books two days a week. Me, I'm in the field half the time.

2 • What kinds of work? Residential service and maintenance 55%. Residential change-outs 30%. Light commercial 15%, mostly restaurants, which I like because they pay.

3 • How many jobs a year? 25 to 28 service calls a day, five days plus half of Saturday. Call it 6,200. Change-outs maybe 180.

4 • How do you charge? Flat rate book on service. Diagnostic \$89, average ticket ends up around \$340. Change-outs quoted, \$6,500 to \$14,000 depending on tonnage and what the ductwork looks like.

5 • What software runs it? We bought ServiceTitan and never really turned it on. What actually runs this company is QuickBooks, a Google calendar, and the phone.

6 • Anything kept outside the software? Paper tickets. And Denise has a clipboard on the wall of tickets that can't be invoiced yet because something's missing off them. I don't know how many are on it. It's thick.

The workflow

7 • Which one? Getting paid for a service call after the tech's done the work.

8 • What starts it? Tech finishes and writes the ticket.

9 • Walk us through it. Tech writes the ticket in the truck, or at the next stop, or at home. Supposed to turn them in Friday. Some do. Denise types them into QuickBooks and makes the invoice. If the ticket's missing the model and serial, or the parts aren't written down right, or there's no signature, it goes on the clipboard until she can get the tech on the phone. Which can be a while because he's on a roof.

10 • How long does the work take? Ticket, 5 minutes for the tech. Denise says typing it and invoicing is 4 or 5 minutes each.

11 • How long does it sit? That's the thing. I thought two, three days. Denise said more like a week and a half. So I pulled twenty at random and it was 11 days average from the date on the ticket to the date on the invoice.

12 • Where does it get stuck? Tickets not coming in. And the clipboard.

13 • What comes in missing something? Serial numbers. Half the time there's no serial. Parts written as "capacitor" with no number. Denise fixes it, or tries.

14 • What goes wrong? We miss warranty claims because we don't have the serial. Compressors are ten-year parts warranty. I'd guess we eat a few thousand a year we shouldn't.

15 • Who sees the whole thing? Denise. If she's out a week we're blind. I know that's not a good answer.

Where it costs

16 • What takes more work than you priced? Maintenance agreements. We sell them at \$199 a year and they eat more visits than we planned for.

17 • Do you track it? A feeling. We don't really track anything.

18 • Five hours back a week? Denise would go home at 5. She hasn't in two years.

19 • Turning away work? Yes, in summer. Can't staff it. And I won't hire a guy I haven't watched work.

20 • What does one earn? \$340 average ticket, call it 45 to 50% gross after the tech's time and the part.

AI right now

21 • Anyone using it? Carla uses ChatGPT to write the texts to customers. She showed me. It's better than what I write.

22 • Did you set that up? No. Her own idea.

23 • Tried and dropped? ServiceTitan. Everybody says it has AI in it now. Nobody here uses it. That's not AI's fault, we never set it up.

24 • Written policy? No.

25 • What would make you uncomfortable? Customer addresses and card numbers. And I don't want a computer telling a customer their compressor is shot when it isn't. That's my name on the truck.

Constraints

26 • Leave anything alone? When a system we touched goes down again I call them myself, same day. That doesn't change.

27 • Licensing or rules? We're licensed CAC. Permits and inspections on change-outs. Nothing exotic.

28 • Anyone push back? The senior techs. Two of them worked for my father. If it feels like I'm checking up on them it'll go badly.

29 • Who has time to make a change? Denise. Who has no time. Which is the problem.

A year from now

30 • What's different? I want to know what we're owed without asking anybody. And I want Denise to stop working Saturdays.

31 • Anything we didn't ask? The change-out side is worse than this, I picked the easy one on purpose. And nobody's ever asked me question 11 before.

TWO THINGS WORTH NOTICING

He didn't write nice answers. Fragments, guesses, and two places where he says out loud that something isn't a good answer. That's plenty. That's all it takes.

The best thing in the review came from one sentence about a clipboard. He mentioned it in passing on question 6. It turned out to be the only place in his company where unbilled work was visible at all.

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