



# Your Blueprint for Growth

## *Building a Profitable Business*

David F. Giannetto, CEO of WorkWave



# Agenda

---

- Tangible actions that will drive greater growth in 2023 and beyond
- How these actions can make your company more valuable and sell for more money

# The Only Ways to Grow

There are a limited number of ways to grow organically:

- Get more customers
- Keep more of your current customers
- Sell more to existing customers - **easiest**

Growth is the primary hard measure driving value

# Action #1

## - Manage to 100% Completion -

# Manage to 100% Completion

- Every Service Order you've sold should be completed as quickly as possible
  - Orders can only be Completed or Cancelled
  - Controllable Reasons are not acceptable outcomes - that is giving away money
  - Likely to first focus on new customers, to lock them in
  - Give priority to recurrent customers

# Manage to 100% Completion

- Every Service Order you've sold should be completed as quickly as possible
  - Orders can only be Completed or Cancelled
  - Controllable Reasons are not acceptable outcomes – that is giving away money
  - Likely to first focus on new customers, to lock them in
  - Give priority to recurrent customers
- Follow every step of the sequence
  - Sold but not scheduled – scheduled but not complete – rescheduled – completed but not billed – billed but not collected – bad debt not sold
- Key metrics
  - % Completion – measured every day
  - % Cancellation – measured by “reason”, frequently

# Manage to 100% Completion



Unserved List



Season Summary  
By Service



Weekly Productivity  
Report



Services on Hold

Total Scheduled				Served to Date			Yet to Be Served		
Serv	# of Serv	Size	\$ US Dollar	# of Serv	Size	\$ US Dollar	# of Serv	Size	\$ US Dollar
MC1	1156	10,667.47	116,621.00	1036	9,595.48	104,435.00	0	0.00	0.00
MC2	1141	10,574.05	115,381.40	1044	9,747.26	105,832.40	4	28.93	357.00
MC3	1133	10,480.62	114,494.40	980	8,827.85	97,767.40	76	1,019.33	9,284.00
MC5	1126	10,336.38	113,509.40	0	0.00	0.00	1126	10,336.38	113,509.40
MC6	1127	10,461.94	114,126.40	0	0.00	0.00	1127	10,461.94	114,126.40
<b>Total</b>	<b>5683</b>	<b>52,520.47</b>	<b>574,132.60</b>	<b>3060</b>	<b>28,170.59</b>	<b>308,034.80</b>	<b>2333</b>	<b>21,846.58</b>	<b>237,276.80</b>

Less Customers On Hold				Less Customers on Credit Hold			Net Yet to be Served		
Serv	# of Serv	Size	\$ US Dollar	# of Serv	Size	\$ US Dollar	# of Serv	Size	\$ US Dollar
MC1	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00
MC2	0	0.00	0.00	1	3.70	66.00	3	25.23	291.00
MC3	2	55.00	308.00	5	38.25	458.00	69	926.07	8,518.00
MC5	4	64.45	464.00	10	68.27	875.00	1112	10,203.66	112,170.40
MC6	4	64.45	464.00	10	68.27	875.00	1113	10,329.22	112,787.40
<b>Total</b>	<b>10</b>	<b>183.90</b>	<b>1,236.00</b>	<b>26</b>	<b>178.50</b>	<b>2,274.00</b>	<b>2297</b>	<b>21,484.18</b>	<b>233,766.80</b>

Next Year Projected Annual Revenue				Started Services too Late K Skips			All Skip Codes Except K Skipped (Service Allowance)		
Serv	# of Serv	Size	\$ US Dollar	# of Serv	Size	\$ US Dollar	# of Serv	Size	\$ US Dollar
MC1	1125	10,378.51	113,475.00	106	979.47	10,964.00	14	92.53	1,222.00
MC2	1126	10,440.23	113,870.40	83	710.33	8,221.00	10	87.53	971.00
MC3	1126	10,399.28	113,677.40	70	566.43	6,723.00	7	67.01	720.00
MC5	1126	10,336.38	113,509.40	0	0.00	0.00	0	0.00	0.00
MC6	1127	10,461.94	114,126.40	0	0.00	0.00	0	0.00	0.00
<b>Total</b>	<b>5630</b>	<b>52,016.35</b>	<b>568,658.60</b>	<b>259</b>	<b>2,256.23</b>	<b>25,908.00</b>	<b>31</b>	<b>247.07</b>	<b>2,913.00</b>

Number of Active Customers 1126

Note: Total scheduled includes services completed and later cancelled

# Unserviced List

Acct #	Customer / Name	Address	Zip	Phone	Email	Size	Charge Inv.Dt	Rt/Day/Seq	Inv.Num	Lst.Srv	H	Prog Services	Max CA	Dn	Balance	Age
186862	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	122.0	\$662.00	100/10/10	4632886	90	N	EL NSSYNYYN	5 N 2		\$0.00	
203383	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	36.00	\$262.00	100/10/10	4632886	90	N	EL SSSYYYYS	8 N 4		\$0.00	
190343	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	4.23	\$74.00	100/10/10	4632886	84	N	EL SSSYYYYS	8 Y 4		\$74.00	16-35
146540	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	3.71	\$73.00	100/10/10	4632886	83	N	EL SSSYYYYS	8 N 4		\$0.00	
86236	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	20.00	\$158.00 6/5/2023	100/10/10	4629808	79	N	EL SSSYYYYS	8 Y 4		-\$1050.70	
130886	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	4.01	\$78.00	100/10/10	4632886	77	N	EL SSSYYYYS	8 Y 3		-\$94.00	
140321	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	3.67	\$73.00 6/6/2023	100/10/10	4632565	76	N	EL SSSYYYYS	8 Y 4		\$0.00	
67864	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	7.33	\$92.00 6/6/2023	100/10/10	4632848	75	N	EL SSSYYYYS	8 Y 4		\$0.00	
52043	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	7.49	\$92.00	100/10/10	4632886	72	N	EL SSSYYYYS	8 Y 4		\$16.00	16-35
137437	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	3.70	\$66.00	100/10/10	4632886	72	N	EL SSSYYYYS	8 Y 2		\$126.84	+90
122281	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	30.00	\$124.00	100/10/10	4632886	72	Y	EL SSSYYYYS	8 Y 4		\$0.00	
145852	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	6.46	\$88.00 6/6/2023	100/10/10	4632659	71	N	EL SSSYYYYS	8 Y 4		-\$1415.50	
64199	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	9.30	\$100.00 6/6/2023	100/10/10	4632548	71	N	EL SSSYYYYS	8 Y 4		\$0.00	
66390	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	8.70	\$99.00 6/6/2023	100/10/10	4632886	71	N	EL SSSYYYYS	8 Y 4		-\$658.35	
121262	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	1.69	\$68.00	100/10/10	4632886	70	N	EL SSSYYYYS	8 N 4		\$68.00	16-35
195463	W&B Windows Services	10000 1st St	20000	(202) 222-2222	info@w&b.com	4.28	\$78.00	100/10/10	4632886	69	N	EL SSSYYYYS	8 Y 4		\$0.00	

- The Unserviced List provides insight into:
  - Critical Production
    - Stops that are aging impact subsequent services and routes
  - Assigned services that were not completed that still require action
  - Services on hold or credit hold



# Daily Technician Recap

## Daily Technician Recap Report

6/21/2023

Acct #	Address	Invoice	Serv Status	Confirmed	Size	Time
79634	[REDACTED]	387782	L01 Completed		9.0000	08:28 AM
92373	[REDACTED]	387783	L01 Completed		6.5000	08:47 AM
240639	[REDACTED]	387784	L01 Completed		7.5000	09:06 AM
240472	[REDACTED]	387785	L01 Completed		7.5000	09:24 AM
102074	[REDACTED]	387786	L01 Completed		5.8000	09:43 AM
137701	[REDACTED]	387787	L01 Completed		5.0000	09:59 AM
77896	[REDACTED]	387789	L01 Completed		5.0000	10:29 AM
75745	[REDACTED]	387790	L01 Completed		7.0000	10:48 AM
8052	[REDACTED]	387791	L01 Incomplete		3.6000	11:05 AM
66689	[REDACTED]	387792	L01 Incomplete		6.0000	11:20 AM
231584	[REDACTED]	387793	L01 Completed		6.0000	11:38 AM
240603	[REDACTED]	387794	L01 Completed		16.0000	11:56 AM
226701	[REDACTED]	387795	L01 Completed		16.0000	12:22 PM
237513	[REDACTED]	387796	L01 Completed		15.0000	12:48 PM
236421	[REDACTED]	387797	L01 Completed		9.0000	01:16 PM
101014	[REDACTED]	387798	L01 Completed		7.0000	01:36 PM
94343	[REDACTED]	387799	L01 Completed		6.0000	01:53 PM
99404	[REDACTED]	0	L01 Skipped : Skip-customer doesn't think n		7.0000	08:11 AM
112044	[REDACTED]	0	L01 Skipped : Skip-customer doesn't think n		4.0000	07:56 AM

Summary	Stop #	Charge
Assigned	19	957.00
Skipped	2	83.00
Cancelled	0	0.00
Completed	15	795.00
Incomplete	2	79.00
ReScheduled	0	0.00
Removed	0	0.00

# Track Adherence to Plan to Increase "Inventory"

Branch:  Date:  Employee:  [Refresh](#)

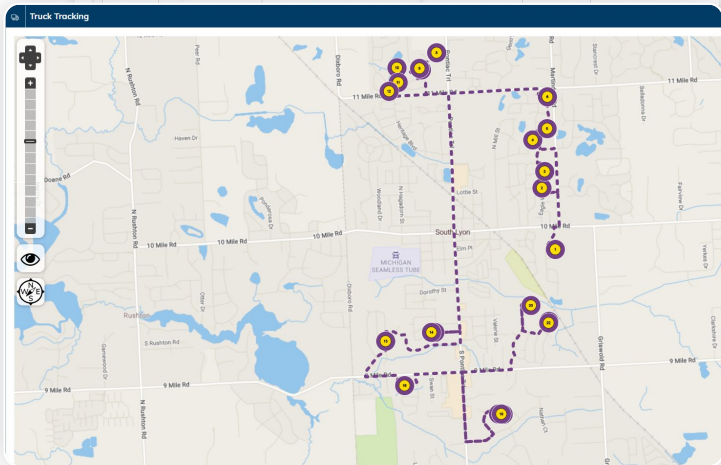
Records marked with bold text indicate the present location of the employee

<input type="checkbox"/>	Employee ID - Name	Scheduled \$	Completed \$	Total Size	Total Estimated Man Hours	Total Actual Man Hours	Total Variance
<input type="checkbox"/>	MIKEC - mikec	432.00	432.00	77.9000	02:29	02:29	00:00

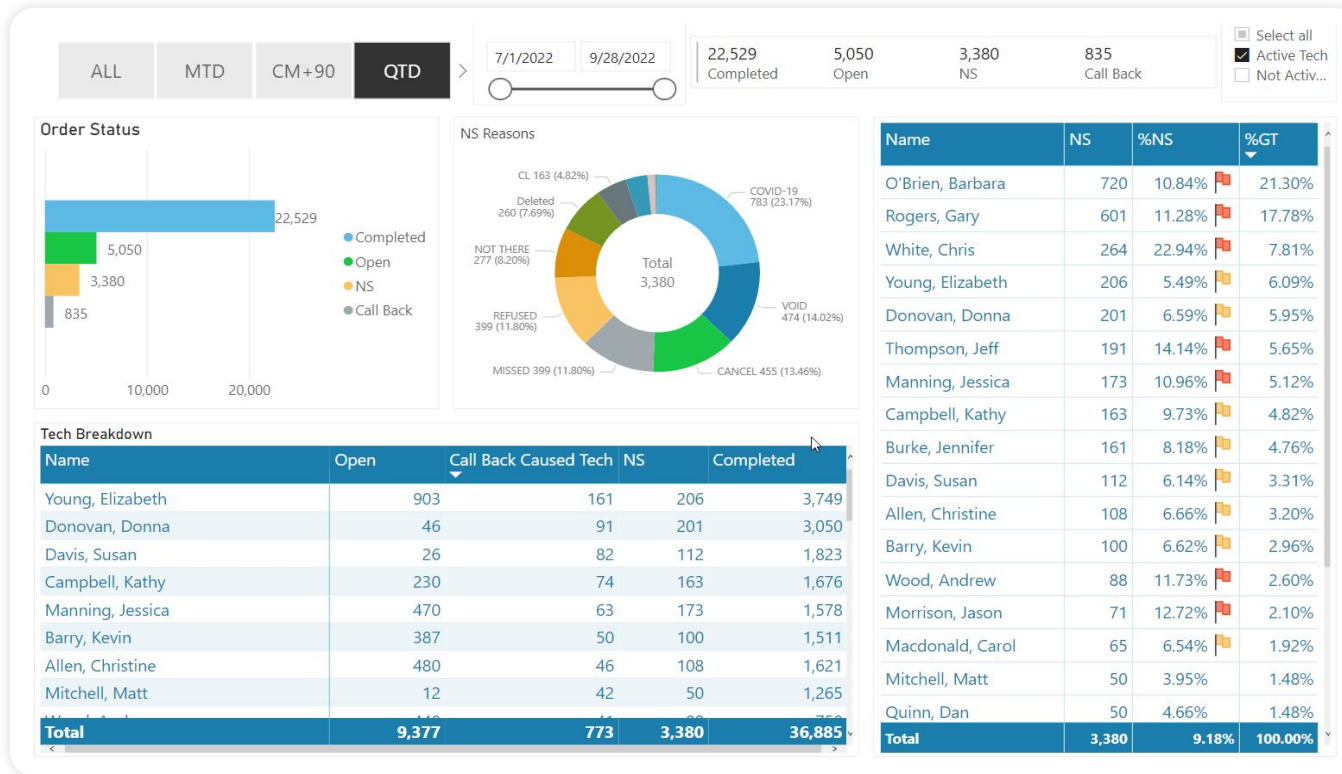
  

Acct #	Customer Name	Address	Invoice #	Services	Price	Size	Service Time	Time Window	Promised	Estimated Man Hours	Actual Man Hours	Variance	Completed	Posted	Call Ahead
10788	MIKEC	11 Mile Rd	387800	L01	59.00	9.8000	06:14 AM			00:20	00:14	-00:06	✓	✓	
99362	MIKEC	10 Mile Rd	387801	L01	44.00	6.0000	06:38 AM			00:16	00:20	00:04	✓	✓	
11618	MIKEC	11 Mile Rd	387802	L01	63.00	10.1000	07:00 AM		✓	00:21	00:30	00:09	✓	✓	
22037	MIKEC	10 Mile Rd	387803	L01	105.00	25.0000	07:37 AM			00:35	00:15	-00:20	✓	✓	
					39.00	5.0000	09:02 AM			00:15	00:20	00:05	✓	✓	
					72.00	14.0000	09:22 AM			00:24	00:35	00:11	✓	✓	✓
					50.00	8.0000	09:48 AM			00:18	00:15	-00:03	✓	✓	
					795.00				137.9000	05:10	00:00	-04:40			

[Send To Live Truck Tracking](#) [Reassign](#)



# Sample Service Order Management Dashboard



# Action #2

## - Retain the Right Customers -

# Retain the Right Customers

- Not every customer is worth the same amount, despite CLV
  - Recurrent customers are worth more
  - Customers in dense areas are worth more
  - Auto-bill customers are worth more

# Retain the Right Customers

- Not every customer is worth the same amount, despite CLV
  - Recurrent customers are worth more
  - Customers in dense areas are worth more
  - Auto-bill customers are worth more
- Price increases can effectively “right size” the customer base
  - Price increases directly drive growth (not just profitability)
  - Price increases should be contextual to the customer you *want* to keep or lose
  - Corporate pricing strategy influences how sales people shape your business
    - “Any customer is worth keeping if they will pay enough”
    - Long-term strategies build long-term value

# Sample Service Order Management Dashboard

The dashboard displays a map of Michigan with several service order locations marked by green circles. A large cluster of these circles is centered around the Ann Arbor area, while other individual circles are scattered in the Flint, Lansing, and Detroit regions. The map includes standard navigation controls like a compass, zoom in/out buttons, and a search bar.

On the left side, there is a control panel titled "Send To" with the following sections:

- Targets:** A dropdown menu currently set to "Add/Remove Customer Flags".
- Add/Remove Customer Flags:** A section with a dropdown for "Add Flag Code" and a "Send" button.
- Flag Codes:** A dropdown menu currently set to "Must Raise Price".
- Buttons:** "Cancel" and "Send" buttons.

Below the control panel is a list of targets, each with a green circle icon and a list of details:

- Target 1: 2023 - Rosecrans (2 addresses, Home, Priority, San. Order)
- Target 2: 2023 - Tomlinson (2 addresses, Home, Priority, San. Order)
- Target 3: 2023 - 1st St/Prescott (8 addresses, Home, Priority, San. Order)
- Target 4: 2023 - Cassworth (3 addresses, Commercial, Priority, San. Order)
- Target 5: 2023 - Ann Arbor (3 addresses, Home, Priority, San. Order)
- Target 6: 2023 - Rosecrans (8 addresses, Home, Priority, San. Order)
- Target 7: 2023 - 1st/Carson (2 addresses, Home, Priority, San. Order)

# Strategically Using Price Increases

- Identify your “real” core branch service area based upon route density
  - For sparse routes within your core service area, focus sales efforts to increase density



# Strategically Using Price Increases

- Identify your “real” core branch service area based upon route density
  - For sparse routes within your core service area, focus sales efforts to increase density
- Identify all accounts in sparse outlying areas and specifically increase price
  - Some customers will leave – that’s right sizing
  - Improves profitability on customers that remain
  - Frees up valuable technician time – more time equals more growth capacity to improve % completion
  - Facilitates proper profitability over the long term

# Strategically Using Price Increases

- Identify your “real” core branch service area based upon route density
  - For sparse routes within your core service area, focus sales efforts to increase density
- Identify all accounts in sparse outlying areas and specifically increase price
  - Some customers will leave – that’s right sizing
  - Improves profitability on customers that remain
  - Frees up valuable technician time – more time equals more growth capacity to improve % completion
  - Facilitates proper profitability over the long term
- Note:
  - If Technicians are assigned to specific territories then technician rates can be increased to the same effect, but this requires constant review

# Increase Price

## Price Increase

Increase Price:

Percentage

Only Renewal prices will be increased for completed or pre-paid services  
Increase is on each round, not the program total

Min/Max:

to

Update renewal price only

[Calculate Price Increase](#)

<input checked="" type="checkbox"/>	Account	Name	Address	Service	Old Std Price	New Std Price	Old Price	New Price	Std Increase	Increase	Renewal Increase	
<input checked="" type="checkbox"/>	844	Giannetti, Al	30381 Stratford Ct	LC - Lawn Care	43.00	46.00	356.00	381.00	3.00	25.00	25.00	
<input checked="" type="checkbox"/>	877	Carrigan, Linda	4602 Cahill Dr	LC - Lawn Care	47.00	50.00	392.00	417.00	3.00	25.00	25.00	
<input checked="" type="checkbox"/>	878	Havas, Richard	219 Ottawa Dr	LC - Lawn Care	76.00	81.00	625.00	667.00	5.00	42.00	42.00	
<input checked="" type="checkbox"/>	883	Jain, Susan S.	5047 Shrewsbury	LC - Lawn Care	56.00	60.00	463.00	496.00	4.00	33.00	33.00	
<input checked="" type="checkbox"/>	901	Munchinger, Fred	3850 Beach Rd	LC - Lawn Care	37.00	40.00	307.00	331.00	3.00	24.00	24.00	
<input checked="" type="checkbox"/>	910	Ruggles, Glenn	2531 Watonga Dr	LC - Lawn Care	37.00	40.00	307.00	331.00	3.00	24.00	24.00	
<input checked="" type="checkbox"/>	912	Sullivan, John	6534 Windmill Ln	LC - Lawn Care	34.00	36.00	282.00	299.00	2.00	17.00	17.00	
<input checked="" type="checkbox"/>	914	Johnson, Mark	3750 Elder Rd S	LC - Lawn Care	61.00	65.00	502.00	535.00	4.00	33.00	33.00	
<input checked="" type="checkbox"/>	918	Angott, Barbara	6615 Sycamore St	LC - Lawn Care	69.00	74.00	567.00	608.00	5.00	41.00	41.00	
Programs: 6011					Totals:	\$281,663.75	\$301,536.00	\$2,335,837.75	\$2,500,232.00	\$19,872.25	\$163,538.25	\$164,394.25

# Action #3

## - Everything should Reoccur -

# Increase Percentage of Recurring Revenue

- All stable things are inherently more valuable
- Stability is boring – boring is valuable

# Increase Percentage of Recurring Revenue

- All stable things are inherently more valuable
- Stability is boring – boring is valuable
- Focus the entire organization on recurring activities
  - Incentivize sales to sell recurring services
  - Incentivize customers to buying recurring packages and extend contractual relationships
  - Incentivize technicians to convert customers while at the property
  - Incentivize technicians to create leads for sales
  - Prioritize recurring customers in all things

# Increase Percentage of Recurring Revenue

- All stable things are inherently more valuable
- Stability is boring – boring is valuable
- Focus the entire organization on recurring activities
  - Incentivize sales to sell recurring services
  - Incentivize customers to buying recurring packages and extend contractual relationships
  - Incentivize technicians to convert customers while in the home
  - Incentivize technicians to create leads for sales
  - Prioritize recurring customers in all things
- Always put credit cards on file
  - Definitely have Account Updater
- Actively work to convert one-time customers to recurring customers

# Green is Naturally Highly Recurrent

- Take advantage of the inherently recurring nature of green
  - Design add-on services that can be done while on-site
  - Create pricing incentives that bring add-ons into the core service offering
  - “Bundle” add-ons wherever possible
  - Auto-renew whenever possible (with automatic price increases)
  - Have an active sales process that up-sells or cross-sells customers



# Screenshots

## MOBILE APPLICATION

A technician can submit a lead into Service Assistant right from the field through the RealGreen Mobile app.

A screenshot of the RealGreen Mobile app's lead entry form. The form is displayed on a mobile device screen with a blue header and a green bar below it. The form fields are as follows:

Customer Type	Residential
House Number	
Pre-direction	(none)
Street Name	
Suffix	
Post-direction	(none)
Address Line 2	
City	
State/Province	
Zip Code	

At the bottom of the form, there are two green buttons: "Create Customer" and "Get GPS Address".

## LEAD MANAGEMENT

Leads can be added and worked from the field on a mobile.

A screenshot of the RealGreen Mobile app's Customer List. The list is displayed on a mobile device screen with a blue header and a green bar below it. The list title is "Customer List". The list contains the following entries:

Customer Name	Status	Address	Size	Action
Jesse Smith	Cancelled - Customer Moved	3100 Gentry Park North Kansas City, 64116	5	
Stanford Smith	Marketing	236 Chaparral Andover, KS 67002	8	
Larry Smith	Marketing	110 Chapel Andover, KS 67002	7	
Chanhom Smith	Marketing	1409 Clubhouse Andover, KS 67002	8	
Geron Smith	Marketing	1413 Clubhouse Andover, KS 67002	12	
Matt Smith	Cancelled	217 Cypress Ct Andover, KS 67002		
Christiane Smith	Cancelled - Customer Moved	1518 Elm St Andover, KS 67002	8	
Jason Smith	Marketing			

At the bottom of the list, there is a green button labeled "New Customer". The page number "8 of 1000" is displayed at the bottom left.

# Screenshots

## REPORTING

Pull a list of all customers without an upsell service.

Utilize email with **Command Center** to create a drip campaign.

Customers With/Without Program/Job(s)

Programs/Jobs: All Programs

- BA - BAYLETON
- CL - CLEARYS 3336g
- COR - Core Aeration
- DB - DURSBAN INSECTICIDE
- DC - Daconil fungicide
- DR - TREE & SHRUB FEEDING

Selected Programs

- CA - CORE AERATION

With  Without

Size: 0 to 9999999.99

Year: 2023

Program/Job Status: Active Status

**Campaign Info**

Aeration Upsell Tuesday, June 13th 2023

**Templates**

Scheduled Upsell Email - Aeration SchUpEmail\_Aeration\_Default.html #5196 General

**Filters** 79 Total Contacts(0.79)

Customer Status: (9) - Active Programs Exclude: (AZ) - Fall Aeration

**Services**

Programs  Bundles

Aeration Special Offer!!!

Proof

# Condition Based Multi-Touch Marketing

- Technicians Drive Upsells

- Technicians are trained to use condition codes that are both informative and upsell services.
- These condition codes can be reported on and used in building campaigns.



## After Service Email

Customer receives After Service email, including promotion to solve their problem



## CAW Promotions

Customer sees promotion anytime they log into CAW



## Email Campaign

Drip email campaign is created in Command Center



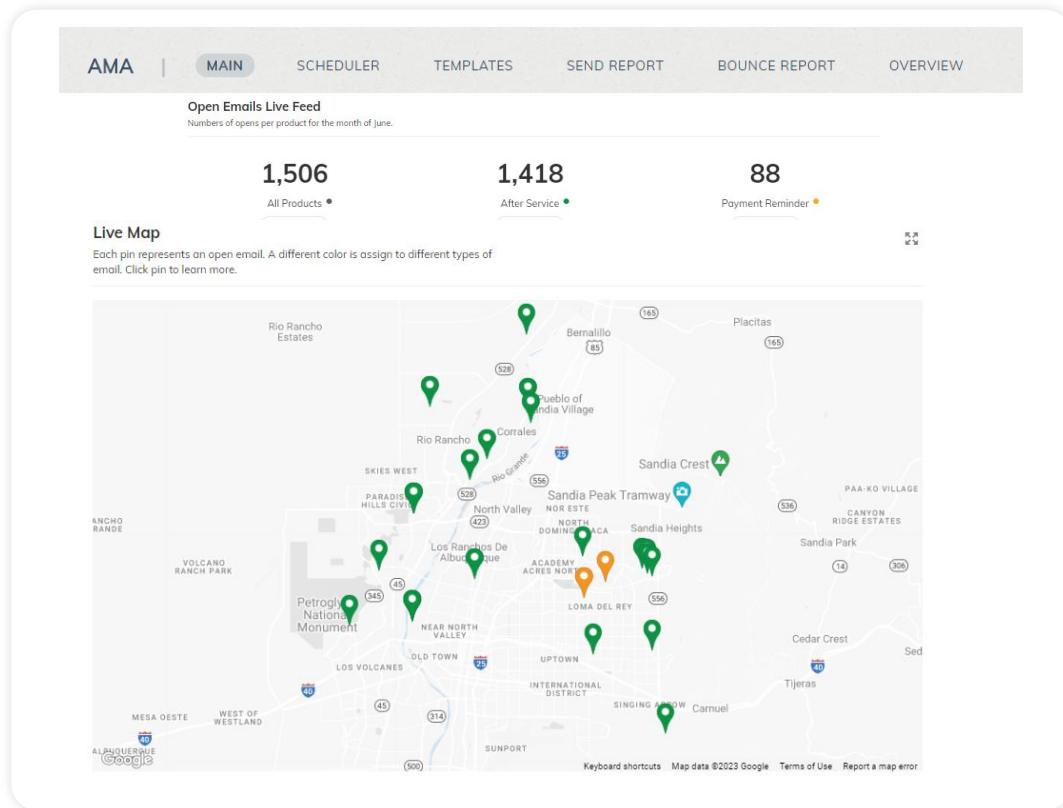
## Sales Call Campaign

Sales call log entries are created for additional touch points

# Screenshots

## COMMAND CENTER

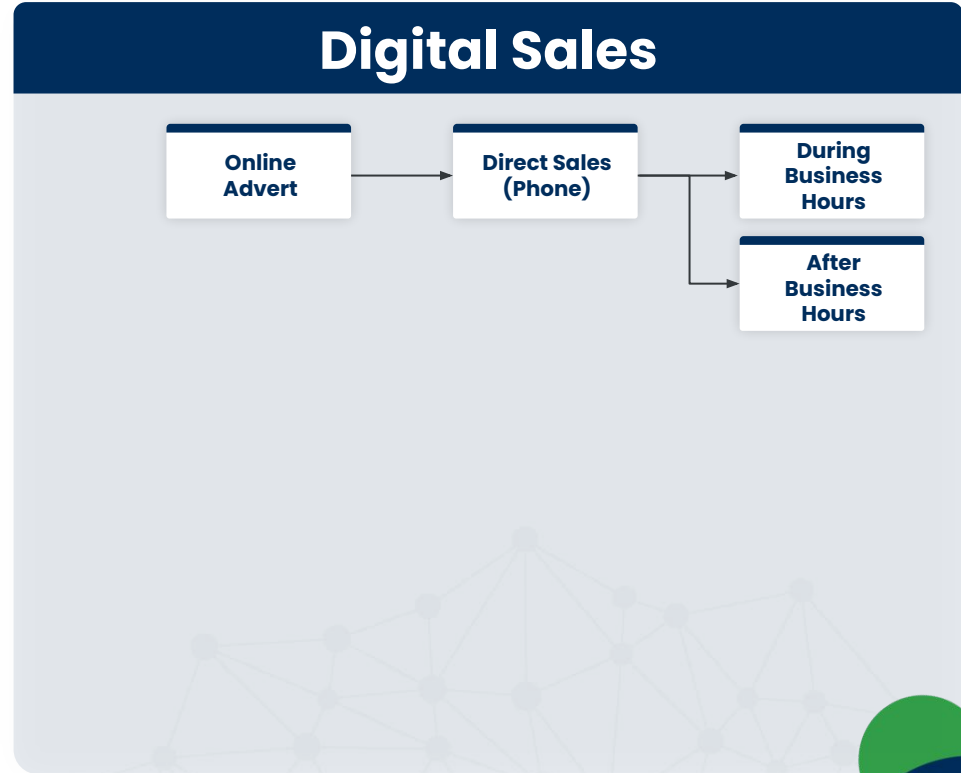
Command Center allows users to set up recurring, scheduled email campaigns and view campaign results



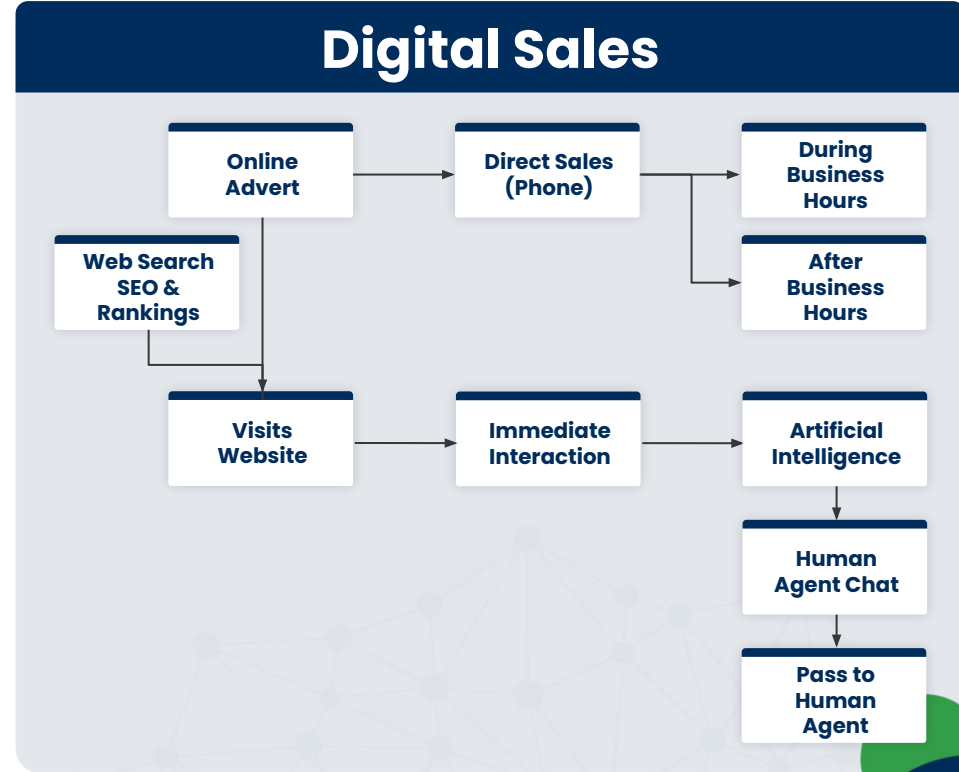
# Action #4

## - A CX Sales Process -

# A Connected Customer Sales Experience

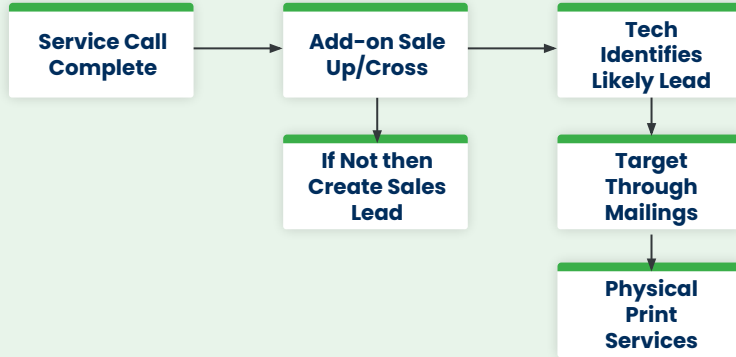


# A Connected Customer Sales Experience

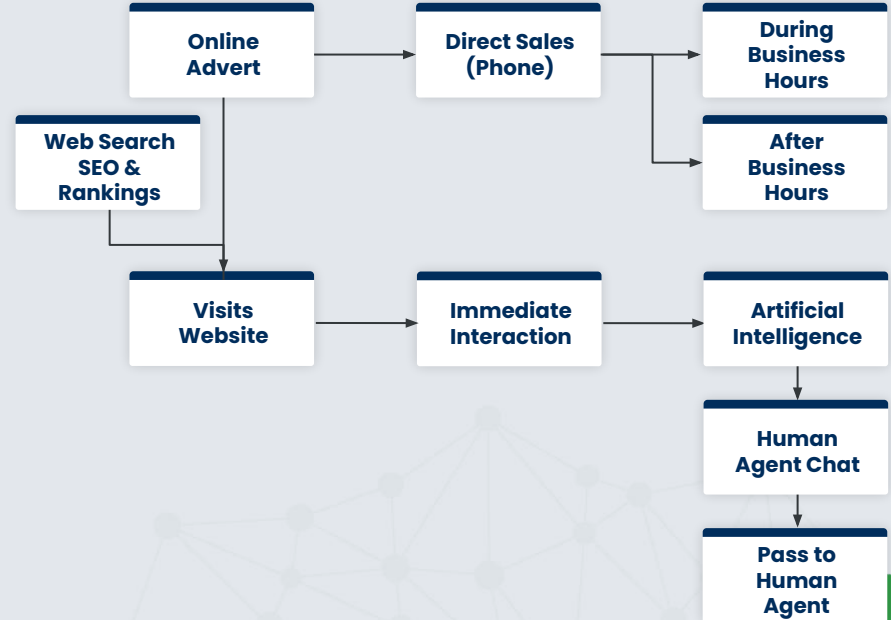


# A Connected Customer Sales Experience

## Physical Sales



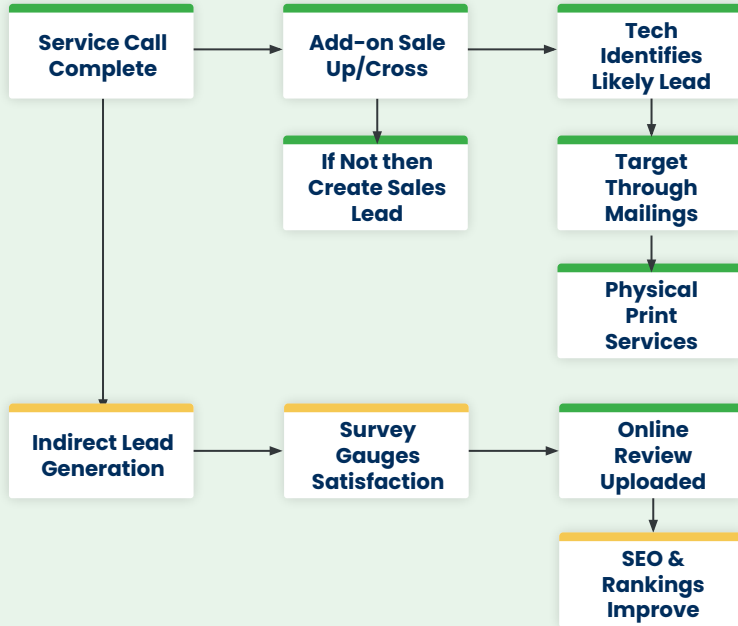
## Digital Sales



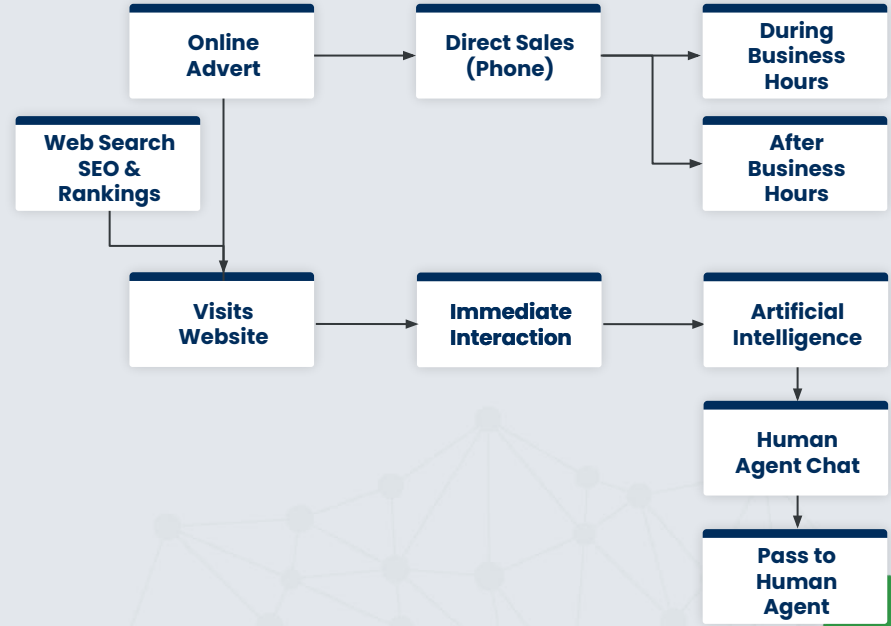


# A Connected Customer Sales Experience

## Physical Sales

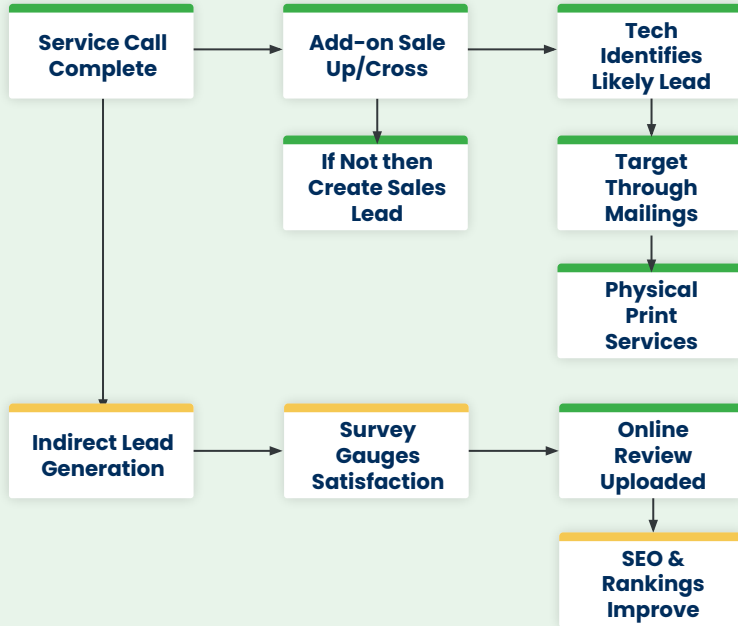


## Digital Sales

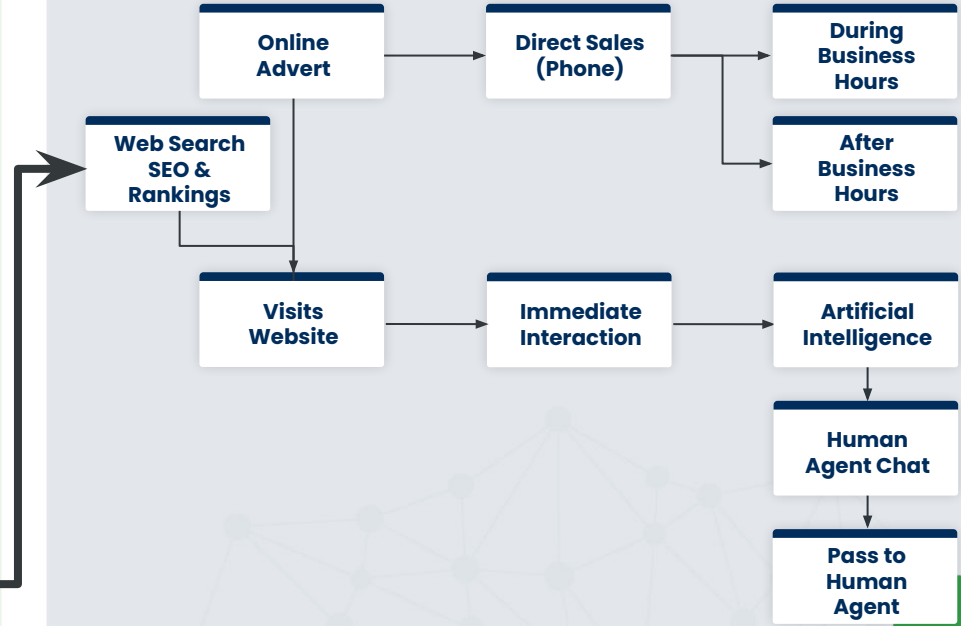


# A Connected Customer Sales Experience

## Physical Sales



## Digital Sales



# Driving Business Value

# The Only Ways to Grow

The “Value” of a company is a math equation:

- Growth and profitability are the two hard measures that most affect the “value” of a company during acquisition
- “Qualitative” qualities can move value slightly up or down
- “Macroeconomic conditions” and “Truly Unique Attributes” (typically dominance within a desirable geographic area) trump everything

Don't think of one day; think of every day

# Top Metrics that Determine Value - \$\$\$

Top Metric	Good Company (3x)	Great Company (5x+)
Consistent Growth Rate	< 8%	> 10%
% Core Business	< 50%	> 70%
Recurrent Revenue	< 70%	> 80%
Gross Margin	< 50%	> 70%
EBITDA	< 20%	> 25%

Gross Margin: Costs required to directly service your customers

EBITDA: Remaining profits after selling, general & administrative costs

# Questions?