

TOP 5 REPORTS

THAT

MAKE A DIFFERENCE

Accurate, intuitive reporting can have a huge impact on your business. Knowing which reports to run on a daily, weekly or monthly basis can help you better understand how your business is performing, identify opportunities for improvement and help you catch data errors before they turn into bigger problems.

Here are our top 5 picks
(which run seamlessly in PestPac):



1

WORK ORDER REPORTING

This is all about understanding which work was completed and which is still scheduled. If you currently use pest control software you, or someone in your office, is likely creating and scheduling work orders either automatically through your software or manually. Although you may have all your jobs scheduled for a particular month, they may not always be serviced as you planned and can be categorized into three different categories:



Completed as scheduled

The PestPac's Route Optimization powerful algorithm allows planners to work smarter, not harder, so more time can be spent focusing on the details.



Posted as not serviced (with a reason attached)

You should aim to keep this number at 2.5% of total work scheduled or lower.



Still out there on the calendar

These are orders that should have been serviced, but they are still on the calendar at the end of the month with no reason code attached.

The second and particularly the third categories are ones you will want to keep an eye on.

By running a work order report each morning, you get an updated view of work that is still left to be completed and if any jobs were missed or you have a high number of “not serviced” posted work you can investigate why.

2**CUSTOM SALES REPORT**

This is all about understanding what was sold in a given week. Understanding how much revenue is coming into the business is critical for owners and managers. PestPac includes a Report Writer module, which gives clients the flexibility to create any report they want and have it automatically emailed to certain employees. Clients often use this tool to create custom sales reports with the specific information they care about. Here are some common pieces of data clients pull into a sales report using the Report Writer to have emailed on a weekly basis:



Recurring services purchased for the week



The salesperson that sold each service



The frequency and price of the service



The annual value of each service



The total monthly recurring revenue added

3

NOTES REVIEW

This is all about capturing and analyzing account calls and notes. This report allows you to review customer calls and office notes logged in your pest control software (such as PestPac). With PestPac, you can also use phone integration and call tracking numbers to automatically log and record incoming calls. You can have different codes (note codes) on the calls themselves. Next, these can be categorized and organized accordingly so that, for example, all the ‘complaints’ notes can be reviewed. A manager can review these notes on an ongoing basis to understand what customer complaints are coming in and resolve issues as needed.



Note Codes

Another example of a note code could be for ‘collection’, which you can use to review collection calls made. You can even set up a ‘sales’ note code and filter by sales reps so they can see the notes set up on their leads.

PestPac allows you to view calls right from the call log screen or the customer’s account.
You can run a Notes Review report for any time period or account you choose.

4

GAIN & LOSS REPORT

This is all about seeing how your business is doing as a whole. Understanding what revenue is coming into the business is only half of the puzzle; you also need to know what revenue you are losing through cancelled services. This report gives you a snapshot of what is coming in and what is “going out”. Clients typically run this report about 1x month.

5**TECH PRODUCTION REPORT**

This is all about understanding the value of work each technician completed. This report gives you keen insight into what your techs are producing and invoicing . You can also see the number of services a technician has completed that don't have a value associated with them, for example "call-back" jobs. Service managers should look at this each day.

For example, if all of a sudden a tech has a call back ratio way out of line perhaps the wrong products are being used or jobs are being rushed. This tool provides valuable insight at your fingertips. It also shows production rates per hour, which is also very useful. We highly recommend this report.

SEE WHAT PESTPAC

CAN DO

FOR YOU TODAY!

We would be happy to provide a deeper dive into any of these reports at your convenience. These are all available in PestPac.

Visit <https://offer.workwave.com/pestpac-demo-lp.html>
or call **866-475-2932** to learn more!