

JLM DATA CONSULTING

Sample Case Study · Residential HVAC Contractor

Client profile: Residential HVAC contractor, Salt Lake County · \$2.2M revenue · 11 employees · 7 field technicians · QuickBooks Online + Housecall Pro

SITUATION

Revenue grew 9% in a year; profit didn't move. The owner suspected pricing but couldn't see where money was actually made or lost — the data existed in QuickBooks and Housecall Pro, but nobody had ever joined the two.

APPROACH

- Joined 12 months of financials to 2,686 job records; built a fully-loaded margin model per job (parts, loaded labor incl. drive time, dispatch cost).
- Modeled the maintenance program's per-member unit economics and reprice scenarios with churn sensitivity.
- Measured billed-hour utilization per technician and traced the variance to dispatch geography.

RESULTS — FOUR WEEKS, FIXED FEE

\$72,700	16x	3 findings
identified annual margin opportunity	return on the \$4,500 engagement fee	each with an owner-ready action and measurement plan

- 42% of repair jobs earned ~\$23 each after true costs → diagnostic-fee restructure worth +\$24,400/yr.
- The \$149 maintenance plan cost \$190 to deliver → repricing flips a −\$16,600 program to +\$14,200: a \$30,900 swing.
- Technician utilization ranged 44–77%, driven by geography → zone dispatching worth +\$17,500/yr with no new software.

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Demonstration case study. Cedar Ridge Heating & Air is a fictional composite; all figures derive from a synthetic dataset built to mirror a typical \$2M residential HVAC contractor, analyzed with the same methods used in live engagements.