Home Service Reporting Playbook

At the end of today, do you know how much money you actually made?

You probably know what you invoiced and how many jobs your crew completed. But profit? For many home service businesses, that only shows up on a monthly profit and loss statement (P&L), often weeks later.

> "So a monthly P&L, you're usually waiting on an accountant to come in and help you make decisions." – **Kasy Allen, Wheatley Creek Services**

A P&L can also leave out data from other tools, like ad spend or labor. By the time you review it, the day it describes is long gone. An **end-of-day** report brings your key numbers together so you can act while they still matter.

With advice from Kasy Allen of Wheatley Creek Services, this guide will help you:

- Identify the business numbers worth tracking
- Use a fillable end-of-day report
- Bring your data together and automate your reporting
- Use AI to build a reporting system around your business

How to use: Download the fillable template on the next page to get familiar with your numbers. Sections 1–4 explain what to track and how to use it. Sections 5–6 shows you how to bring your data together, automate your reporting, and use AI to take it further.

End-of-Day Report Template

Use this template to get familiar with your numbers. As you work through the guide, you'll learn what to track, how to act on it, and how to automate your reporting.

Date: ______________________________

REVENUE PERFORMANCE
Revenue invoiced: $________________ Goal: $________________
Jobs completed: ________________ Goal: ________________
Revenue, Trailing 7 days: $________________
Revenue, Trailing 30 days: $________________

PROFITABILITY
Gross profit, trailing 7 days: $________________ (_______%)
Gross profit, trailing 30 days: $________________ (_______%)
Net profit month to date: $______________ (_______%)
Labor: _______% of revenue
COGS: _______% of revenue

SALES PIPELINE & MARKETING
Requests received: ________ Quotes sent: ________
Quotes approved: ________ Jobs booked: ________
Ad spend: $______________ (_______% of revenue)
CAC, rolling 30 days: $____________

CLIENTS + CAPACITY
Clients gained: ____________ Clients lost: ____________
Open spots this week: ____
Capacity: [] Under [] On track [] Over

BY LINE OF SERVICE

Service	Revenue ($)	Gross Profit Margin (%)

WHAT NEEDS ATTENTION?

ACTION TO TAKE TOMORROW

POWERED BY JOBBER

1. Know the Numbers That Drive Decisions

Before you build your report, make sure you know what you're measuring. One metric that often causes confusion is profit margin, because gross profit and net profit tell you different things.

"I feel like a lot of times when people say profit margin, they're talking about gross, but there is a difference between the two." – **Kasy Allen, Wheatley Creek Services**

Metric	What It Tells You
Gross profit	Revenue left after direct job costs like labor and materials.
Net profit	What's left after subtracting overhead expenses from gross profit.
COGS percentage	How much of your revenue goes toward the direct costs of completing the work.
Labor percentage	How much of your revenue goes toward labor.
Customer acquisition cost (CAC)	How much you spend to acquire a customer.
Trailing 7 and 30 days	Your recent performance over a rolling 7- or 30-day period, instead of a calendar month.

"If you do a job for a thousand dollars and your labor was 500 and your materials were 200, that's $700, your gross profit was only 30%." – **Adam Sylvester, Charlottesville Lawn Care and Gutter Pros**

Pro Tip: Know what a healthy margin looks like for your specific services before reacting to a change. Kasy aims for about 50% gross profit overall. A small dip doesn't worry her, but a bigger one sends her looking for the cause: "If I get down to 30, then I'm starting to dig in. What's going on?"

2. Break Your Numbers Out by Line of Service

If you offer more than one service, one combined number can hide what's really happening.

Kasy's remodeling work, for example, can collect a large deposit one month and pay subcontractors the next. That makes the same project look highly profitable one month and much less profitable the next. Her recurring cleaning work is steadier, while deep cleans and one-time jobs fluctuate more.

If your overall margin suddenly drops, break it out by line of service before reacting.

> "When you're looking at it for the month, and if you see it drops to that 30, 20% and you get that panic... break it up and then see where that's coming from." – **Kasy Allen, Wheatley Creek Services**

Line of Service Checklist:

- ☐ Every job in your system is tagged to a line of service
- ☐ You can pull gross profit by line of service, not just overall
- ☐ You know which services are repeat work and which are projects
- ☐ You have a separate margin target for each line of service

3. Act on What the Report Tells You

You don't need to act on every number every day. One bad day could just be noise. Make a note, check again tomorrow, and if the trend continues, move to the weekly view and dig in. Checking daily gives you time to respond before the week gets away from you.

Watch your schedule too, not just your P&L. Holes in next week's calendar could be a signal to run a promotion or send an email, and a packed calendar could mean it's time to hire.

Reading Your Report Checklist:

- ☐ You check your report at the end of the day, before you close down
- ☐ You don't make big decisions off a single day's number
- ☐ When something looks off, you back up to the weekly view before reacting
- ☐ You have a short list of moves ready for when the pipeline is behind
- ☐ You look at your schedule for holes and for overload, not just your revenue

4. Get Your Crews Reporting Too

Crew reports give you context the financial numbers can't, like job site issues, customer satisfaction, and safety concerns. Keep the report to a few questions your team can answer in under a minute. Kasy asks:

- Was there a safety concern today?
- Were there any issues with customers today?
- On a scale of one to five, how satisfied were customers?

Close the loop by showing your team how their reporting gets used. Otherwise, Kasy warns, reporting fatigue can set in.

Crew Reporting Checklist:

- [ ] Your crews submit an end-of-day report from their phones
- [ ] The report is three or four questions
- [ ] Crew reports feed the same sheet as your financial data
- [ ] You show crews what they reported, weekly or monthly

Pro Tip: Share the results with your team weekly or monthly and connect reporting to something they can see. Kasy treats completing the report as a KPI and ties a bonus to it.

5. Get Your Data Into One Place

By now, you've spent some time filling out your end-of-day report and getting familiar with the numbers you actually use. The next step is to stop entering those numbers yourself.

Kasy brings data from Jobber, QuickBooks, and her team reports into one place so she can check performance without exporting, copying, and pasting every day. Here's how you can work toward a similar setup.

Stage 1: Start with the reporting you already have

Before building anything new, see what your current tools already track. Jobber's reporting software gives you access to data on quotes, jobs, invoices, and more. You can also adjust the date range to look at performance over different periods.

"Jobber Insights makes it really, really simple to go and get a lot of those answers. The insights report pulls a lot of that data for you and you can adjust it based on the dates that you want to see." – **Kasy Allen, Wheatley Creek Services**

Stage 2: Send your Jobber data to one place

Kasy pulls her quote, job, and invoice data from Jobber into Google Sheets using the Zapier integration. The data flows into her sheet automatically instead of being exported and entered by hand.

Pro Tip: If formulas are slowing you down, Kasy uses Claude to help build and troubleshoot them. "Google Sheets is great because I use Claude to help build this entire tool. So if I get a formula wrong, it can look at it, see the formula and correct it for me," said Kasy.

Stage 3: Bring in your financial data

Kasy uses Coefficient, a Google Sheets add-on, to connect QuickBooks and pull her P&L into the same spreadsheet. This lets her bring business activity and financial performance together instead of checking them in separate places. If you already use the QuickBooks Online sync with Jobber, some of that connection may already be in place.

Stage 4: Turn your data into a dashboard

Before trusting an automated report, compare it with your existing reporting until the numbers match. Kasy suggests monitoring both for a month or two.

Her next step is connecting the data to Google Looker Studio to create a dashboard that can be shared by link and viewed by day, week, or month.

Data Flow Checklist:

- [ ] Your quotes, jobs, and invoices flow into one place automatically
- [ ] Your P&L is connected instead of entered by hand
- [ ] Your bookkeeping is current enough to trust the numbers
- [ ] Your crew reports feed into the same reporting system
- [ ] You no longer need to export, copy, and paste your core data
- [ ] You've compared the automated report against your existing reporting

6. Use AI To Build A Report Around Your Business

Once your data is coming together, AI can help you organize it around the goals and metrics that matter to your business.

Kasy recorded her end-of-year review and quarterly meeting, uploaded the transcripts to Claude, and asked it to build reporting around the priorities her team had discussed.

"I put that transcript into Claude and said, "Based on all of this, help me build a daily report that also shows me the monthly and the quarterly." – **Kasy Allen, Wheatley Creek Services**

The more context you give AI, the more useful the output can be. For example, Kasy's business operates in a Colorado ski town where demand changes throughout the year. "Claude may know that I live in a mountain resort, but it may not know that seasonality. So I would be telling it that as it's learning," said Kasy.

Reporting Dashboard AI Prompt:

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I want better insight into my business.

My business: [business type, lines of service, team size, and service area]

The tools I use: [Jobber, QuickBooks, Google Sheets, payroll software, etc.]

The metrics I want to track: [revenue, gross profit, labor percentage, jobs
booked, CAC, etc.]

My goals: [revenue, profit margin, jobs completed, growth goals, etc.]

My busy season: [months]

My slow season: [months]

Help me build a reporting system that shows my daily, weekly, monthly, and
quarterly performance. Recommend how I should organize the data, which
metrics I should compare, and what I could automate so I don't have to enter
everything manually.
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Jobber AI is another way to quickly get business insights. Instead of only looking at a dashboard, you can ask questions about your business in plain language and use those answers to help guide business decisions.

Turn Your Numbers Into Your Next Move

Start by getting familiar with the numbers that matter to your business. Then make reporting easier by bringing your data together and automating the work you've been doing by hand.

> "Get smarter with the numbers that are happening in your business and you can make more informed decisions." – **Kasy Allen, Wheatley Creek Services**

Jobber can help you keep that momentum going: track revenue, quotes, jobs, invoices, and more with Jobber reporting, use insights to spot trends, and ask Jobber AI questions about your business to get quick answers from your data.

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