OPERATOR HQ

SAMPLE REPORT

The Friction Report

Where your operation is leaking revenue, and the systems that recover it

PREPARED FOR

Sample Operation Co. (Sample)

July 2026

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Executive Summary

REVENUE + COST AT STAKE / MONTH

$9,250

PROJECTED HRS RECOVERABLE

22 / wk

HOURS LEAKING / WEEK

31

AUTOMATION OPPORTUNITIES

5

Sample Operation Co. is a fictional eight-person home-services operation, built so you can judge exactly what a Friction Report delivers before you buy one. Its pattern is one we see constantly in the field: the phones stop selling at 6pm, the schedule lives in the owner's thumbs, and cash lags the work by weeks. Every figure below is illustrative, internally consistent, and produced the same way a live assessment produces them.

Your Three Biggest Bottlenecks

1. Lead capture stops when the phones do

Calls after 6pm and on weekends route to a voicemail box nobody owns. Two to three booked jobs a month are lost to whoever answers first, and the morning callback scramble eats the dispatcher's first hour of every day.

Root cause: No after-hours coverage and no ownership of the callback queue.

4 hrs / wk **$3,400 / mo**

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2. The schedule lives in one person's thumbs

Dispatch runs through the owner's text messages. Every reschedule is retyped three times: to the tech, to the customer, and into the calendar. Job history lives in memory, so techs call the owner from driveways to ask what was done on the last visit.

Root cause: No shared system of record for jobs, so coordination defaults to the owner.

16 hrs / wk **$3,470 / mo**

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3. Cash lags the work

Quotes go out days after the site visit and invoices are chased by hand at month end. Work that is already won sits unbilled, and quotes that would have closed go stale in the follow-up gap.

Root cause: Quoting and invoicing are end-of-day batch work squeezed around field time.

11 hrs / wk **$2,380 / mo**

Operational Pain Points

Missed after-hours calls become lost jobs

The phone lines close at 6pm but the customers do not. After-hours callers reach voicemail, and the ones with urgent work book whoever answers first.

> “If it rings after six, it is gone. I hear the voicemail the next morning and half the time they already booked someone else.”

4 hrs / wk **$3,400 / mo**

Dispatch runs on text messages

Scheduling, rescheduling, and confirmations all flow through the owner's phone. Nothing moves when the owner is on a job site.

> “I am the calendar. If I am on a roof, nobody gets scheduled.”

9 hrs / wk **$1,950 / mo**

The owner is the only job-history database

Past work, quirks of each property, and what was quoted last time live in the owner's memory. Every field question becomes a phone call.

> “Techs call me from the driveway to ask what we did there last time.”

7 hrs / wk **$1,520 / mo**

Quotes go out days after the site visit

Quotes are written at the kitchen table after field hours, so they land two or three days late, after the buying moment has cooled.

> “Quotes go out when I get to them, usually two or three days late.”

6 hrs / wk **$1,300 / mo**

Invoice follow-up drags into the next month

Invoices are batched at month end and payment is chased by hand, so cash from week-one work often arrives in week six.

> “We do the work in the first week and see the money in the sixth.”

5 hrs / wk **$1,080 / mo**

Recommended Automation Opportunities

AI voice agent answers every call, day and night

Answers after-hours and overflow calls, books the job into the calendar, and logs every caller so nothing disappears into voicemail.

EFFORT 2/5 IMPACT 5/5 3 hrs saved / wk $3,400 / mo value

Shared scheduling and dispatch with automatic confirmations

One system of record for jobs. Customers get confirmations and reminders without anyone typing them, and a reschedule updates the tech, the customer, and the calendar in one step.

EFFORT 3/5 IMPACT 5/5 7 hrs saved / wk $1,950 / mo value

Same-day quotes with automatic follow-up

Quotes generate from the site-visit notes the same day and a follow-up sequence chases every open quote until it gets an answer.

EFFORT 2/5 IMPACT 4/5 4 hrs saved / wk $1,300 / mo value

Automated invoicing and payment reminders

Bills the work the day the job closes and reminds on a schedule, pulling cash forward instead of chasing it at month end.

EFFORT 2/5 IMPACT 3/5 3 hrs saved / wk $1,080 / mo value

Job-history knowledge base techs query from the field

Every job gets a record techs can search from a phone, so past work stops living in the owner's memory.

EFFORT 4/5 IMPACT 4/5 5 hrs saved / wk $1,520 / mo value

Your 90-Day Roadmap

01

PHASE 1 · DAYS 1–30

Quick Wins

- **Deploy the after-hours AI voice agent** · Week 1. Closes the largest single revenue leak first. Every missed call is a job handed to a competitor, and this stops the bleeding without touching the daytime workflow.
- **Turn on same-day quote follow-up** · Week 2. Quotes that go out the same day close at a meaningfully higher rate than quotes that go out three days later. The sequence chases every open quote until it gets an answer.

02

PHASE 2 · DAYS 31–60

Medium-Complexity Builds

- **Stand up shared scheduling and dispatch** · Days 31 to 45. Moves the calendar out of the owner's phone and gives every job one record. This is the prerequisite for the field knowledge base in phase three.
- **Automate invoicing and payment reminders** · Days 45 to 60. Bills the work the day it closes and chases payment on a schedule, pulling cash forward out of the sixth week.

03

PHASE 3 · DAYS 61–90

Strategic Implementations

- **Build the job-history knowledge base** · Days 61 to 90. Once every job has a record, techs can query past work from the field and the owner stops being the database. This is what makes the operation durable rather than owner-dependent.

Next Steps

- Review this report with your operating team. Tag the three quick wins you want to pilot in the next 30 days.
- Schedule a 30-minute debrief call with Operator HQ to walk through the findings and sequence implementation.
- Decide which items you want Operator HQ to build vs. items your team will own internally.

Book the debrief: **https://cal.com/operatorhq/debrief**

Questions before the call? Reply to the delivery email or reach us at **frank@cascadestrategicsolutions.com**.

Methodology

This report was built from a recorded 30-minute operator interview. The transcript was cleaned, pain points extracted with verbatim quotes, bottlenecks ranked by cumulative hours and cost, and automation opportunities scored on effort and impact.

This sample was constructed to demonstrate the format; a live report is built from your recorded interview.

Hours and dollar estimates are operator-reported figures or our analysis of reported workload. Treat them as directional. The order of magnitude is accurate; individual line items may vary ±20% from validated measurements.

Cost figures use your industry’s fully-loaded hourly rate for the roles affected. Implementation estimates assume standard integrations and exclude custom schema work.