BARTON
OPERATIONS GROUP, LLC

Operations Checkup
Hollins Run Heating & Plumbing

Process reviewed: finished service call to invoice sent

Prepared by Barton Operations Group, LLC · 23 Oct 2026
Sample report. The business, people and ticket records are fictional.

Invoices go out 9.1 days after the job

Operations Checkup: finished service call to invoice sent. Site visit 20 Oct 2026

Most delay is between steps; the first changes to test need no new software.

9.1 days

Job to invoice sent

Mean of 48 tickets; median 8.5

35%

Tickets missing details

17 of 48 at the first check

$28k

Estimated unbilled work

Run-rate estimate, not a balance

Recommended first step

Get every ticket to the office the day of the job, complete, then enter and send invoices daily.

Decision: owner. No new staff. Proposed target: a 2-day average, rechecked 30 days after starting.

Fictional sample; synthetic records. 48 of 110 tickets, 21 Sep–2 Oct 2026, traced to invoice sent dates.

What we looked at and how

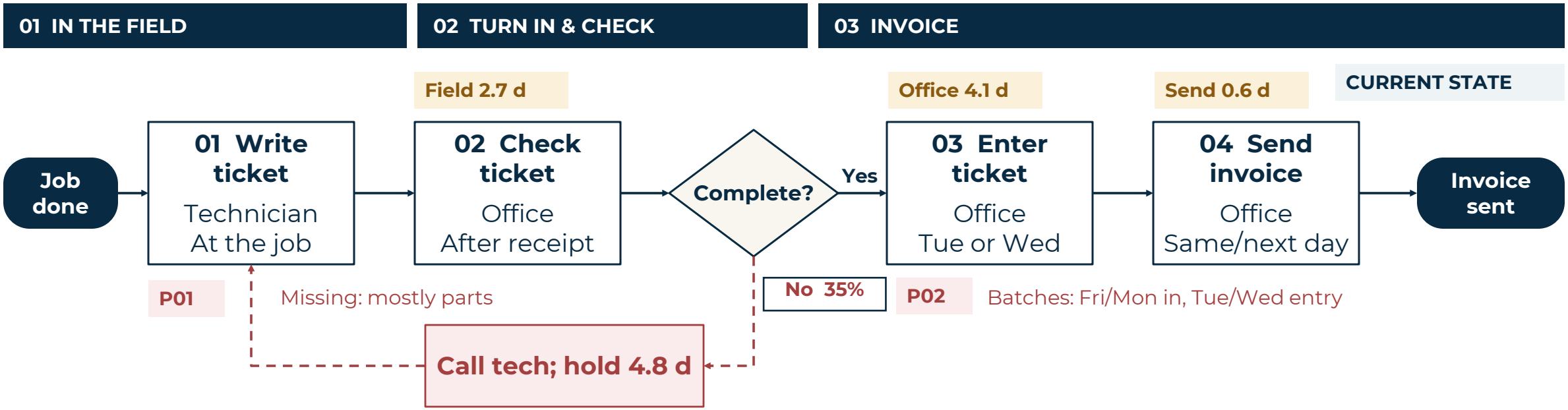
One process, one half-day visit, one report

Process	From a technician finishing a service call to the invoice being sent to the customer.
What we did	Discovery call 13 Oct. On site 20 Oct, 8:00–11:30: watched ticket checks and entry, and talked with the owner, office manager and two technicians.
Evidence	48 of 110 eligible tickets from 21 Sep–2 Oct, drawn at random. Dates from the office stamp, office notes and QuickBooks. All records are synthetic.
Not covered	Installs, maintenance agreements, pricing, collections and payment timing. Anything larger is quoted separately.

Fictional sample. Scope agreed on the discovery call. The ticket records were built to demonstrate the method.

How a service ticket becomes an invoice today

Boundary: technician finishes the service call to invoice sent to the customer



2.7 d	4.1 d	1.7 d	0.6 d	9.1 d	65%
Field handoff	Office wait	Details hold	Entry to sent	Job to invoice	Complete first time

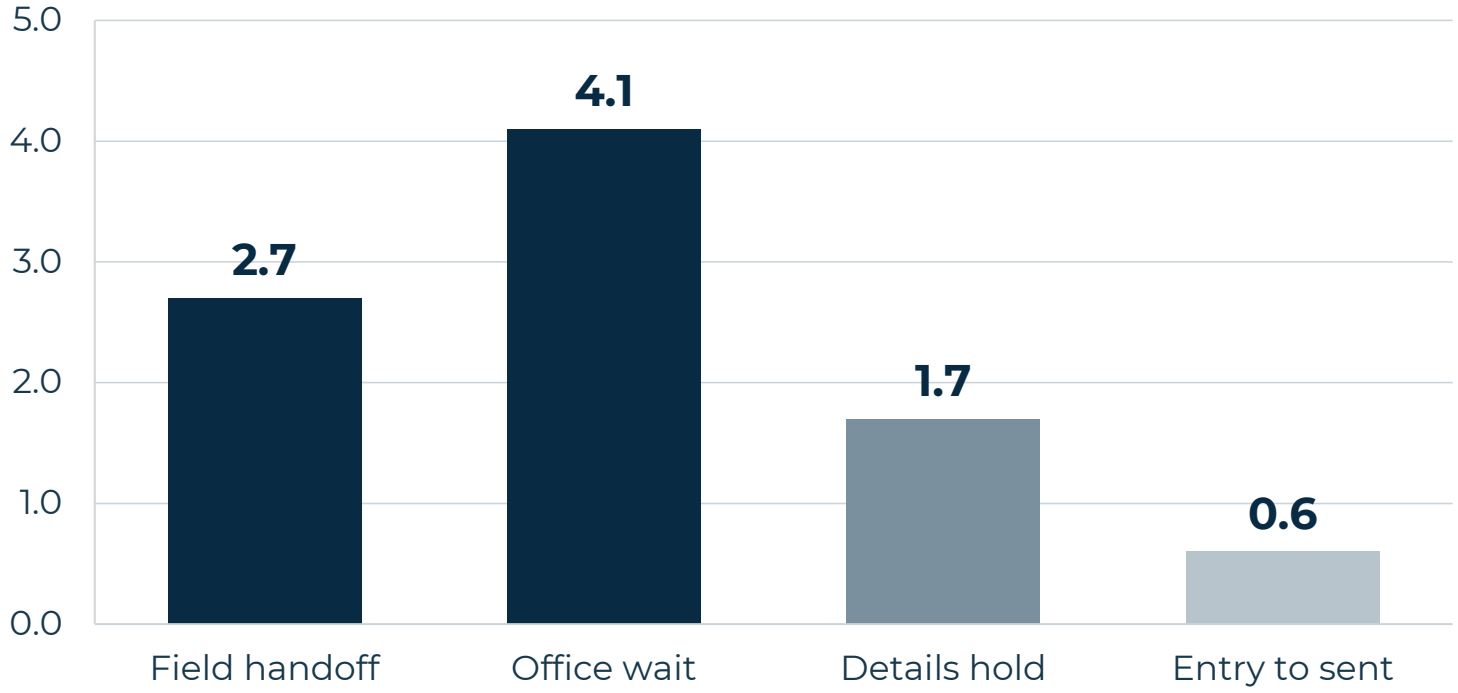
Validation: owner, office manager and two technicians walked through this map on 20 Oct.

Fictional sample; synthetic records. Means of 48 tickets, calendar days. Stage definitions are on page 11.

Field handoff and office wait: 75% of the delay

Where the 9.1 days go: mean calendar days per ticket, 48 tickets

MEAN DAYS PER TICKET, BY STAGE



75%

of the 9.1 days is field handoff and office waiting

Operational response

Same-day tickets and daily entry go straight at these two stages.

Details hold: 1.7 days across all 48; 4.8 days for the 17 incomplete tickets.

Fictional sample; synthetic records. Mean days per stage: 2.73, 4.15, 1.69 and 0.58. Component means shown to two decimal places; totals calculated from unrounded records.

Batching and missing details drive the delay

Three findings from 48 tickets and a morning in the office

F01

Tickets arrive late

45 of 48 arrived on a Friday or Monday, 2.7 days after the job on average.

Implication

Send each ticket the day the job is done.

F02

Entry happens in batches

All 48 were entered on a Tuesday or Wednesday: 4.1 days of office waiting.

Implication

A short daily entry-and-send routine.

F03

Details go missing

17 of 48 tickets were incomplete at the first check; 12 lacked parts.

Implication

Required parts, hours and approval on every ticket.

Fictional sample; synthetic records. 48 tickets, 21 Sep–2 Oct 2026. One main reason recorded per incomplete ticket.

Fix the handoffs before buying software

Recommendation R01 addresses F01, F02 and F03

Same-day tickets, required fields and a daily entry-and-send routine.

Why

Field handoff and office waiting are 75% of the delay; missing parts are the top reason for holds.

Delivery

Same-day tickets by a channel the team already uses, fully filled in. The office enters and sends daily.

Control

The office reviews uninvoiced work daily; anything over 2 workdays goes to the owner with a next action.

Decision for

Owner

Two weeks to start
No new software or staff

Exceptions: see the proposed rules on the next page.

PROPOSED

Fictional sample. Proposed changes; none are in place yet.

Proposed rules for the exceptions

To agree with the team before starting. Accuracy comes before speed.

SITUATION	PROPOSED RULE	WHO
Details missing at the first check	Ask the tech that day. The ticket stays on the unbilled list until complete; never invoice from guesses.	Office manager; technician
Ticket can’t be sent the same day	Send it by 9 a.m. the next workday and tell the office why.	Technician
Approval or charges disputed	Hold the invoice. The owner contacts the customer within 2 workdays.	Owner
Office manager out	A named backup runs the daily review. Entry can wait a day; the review can’t.	Owner names the backup
Ticket over 2 workdays with no invoice	Escalate with the reason and the next action.	Office manager to owner

Fictional sample. Proposed operating rules; none are in place yet. 2 workdays is a control threshold, separate from the calendar-day average.

Implementation plan: four steps, no new staff

The last column shows the routine is running, not that it is working

STEP	ACTION	OWNER	WHEN	EVIDENCE IT'S RUNNING
01	Agree the channel and the required fields	Owner with technicians	Week 1	Channel named; new ticket printed and in every truck
02	Send every ticket the day of the job	Technicians	From week 2	Receipt date matches job date; each miss listed weekly
03	Enter and send invoices every workday	Office manager	From week 2	Daily billing check completed; ready tickets entered and sent; exceptions logged
04	Review the unbilled list every workday	Office manager; owner	From week 2	Review done daily; each late ticket has an owner and next action

Optional next step
BOG can help set this up and run the 30-day check as a separate, fixed-price project. No obligation.

Fictional sample. Steps and timing are illustrative.

Proposed targets and the 30-day check

Targets to test, not forecasts. Same boundary and calendar-day clock as today

TODAY	WHAT CHANGES	PROPOSED TARGET
9.1 days to invoice (mean)	Same-day tickets	≤2 days to invoice (mean)
65% complete first time	Required fields	≥90% complete first time
Est. $28k awaiting invoice	Daily entry and send	Est. $6k awaiting invoice
	Daily unbilled review	

How the 30-day check works

Group: every job finished in the first 30 days after the new routine starts, held tickets included.
Day 30 is a provisional review: the count, the mean for invoiced jobs, and how many are still waiting and how long. That outstanding count and age weren't measured in this baseline.
The final comparison with 9.1 days, on the same calendar-day clock, follows once every job is invoiced.

Fictional sample; synthetic records. Dollar figures are run-rate estimates: about $21,175 a week ÷ 7 × mean days. Targets are initial goals for the owner to agree.

Definitions, the estimate and the limits

How every figure in this report was counted

TERM	DEFINITION / FORMULA	DATA / BASIS
Job to invoice	Mean calendar days from the job date on the ticket to the invoice's sent date	Paper tickets; QuickBooks sent dates
Delay stages	Field: job to receipt. Office wait: receipt to check, plus complete to entry. Hold: check to complete. Send: entry to sent.	Never overlap; they add up to each ticket's total. Office stamp and notes; QuickBooks
Missing details	Incomplete at the first office check; one main reason recorded per ticket	Office notes: 17 of 48 (parts 12, approval 2, address 2, hours 1)
Unbilled work (estimate)	$21,175 a week ÷ 7 × 9.1 days ≈ $28,000. Not a balance, new revenue or faster payment	Assumes steady volume and that the average delay holds across job sizes
Sample	48 of 110 eligible tickets, 21 Sep–2 Oct 2026, by seeded random draw. Synthetic records	All 48 sent by 20 Oct; installs and maintenance excluded

Limits: two weeks in early fall. Payment dates were not reviewed, so no claim is made about faster payment.

Fictional sample. All records are synthetic, built to demonstrate the method. No client data is included.

Five of the 48 tickets, step by step

Every date needed to rebuild each total. F = field, O = office wait, H = hold, S = send

NO.	JOB	RECEIVED	CHECKED	COMPLETE	ENTERED	SENT	F + O + H + S
#4151	Fri 25 Sep	Fri 25 Sep	Mon 28 Sep	Mon 28 Sep	Tue 29 Sep	Tue 29 Sep	0 + 4 + 0 + 0 = 4
#4115	Tue 22 Sep	Wed 23 Sep	Wed 23 Sep	Wed 23 Sep	Tue 29 Sep	Wed 30 Sep	1 + 6 + 0 + 1 = 8
#4101	Mon 21 Sep	Mon 28 Sep	Mon 28 Sep	Mon 28 Sep	Wed 30 Sep	Wed 30 Sep	7 + 2 + 0 + 0 = 9
#4110	Mon 21 Sep	Fri 25 Sep	Mon 28 Sep	Tue 6 Oct (approval)	Wed 7 Oct	Thu 8 Oct	4 + 4 + 8 + 1 = 17
#4102	Mon 21 Sep	Mon 28 Sep	Mon 28 Sep	Fri 2 Oct (parts)	Wed 7 Oct	Thu 8 Oct	7 + 5 + 4 + 1 = 17

Reading a row: #4102 spent 7 days in the truck, 4 waiting for parts details, 5 days of office waiting before entry and 1 to send: 17 days.

Fictional sample; synthetic records, 2026. Missing details were requested at the first check. Days are calendar days.