

Pricebook LUCY

Pricebook Intro

All right, welcome to price book time. Okay, it's time to build your own price book. Okay, so hopefully by this point, you've been charging flat rate for a little bit, and you've got some marketing in place and you're starting to get work. And now we need to get rid of the time it takes to build an estimate. Okay? So we wanna systemize that and that's where our price book comes in. You know, a few reasons for a price book is you can systemize the pricing for 90% of your tasks. That way your guys can do it way faster, way more consistent, guaranteed more, profitability, and it allows you to price upfront to the customer. It looks super professional to the customer when you're out their house and you have a price book on an iPad and you can just click some buttons and a price pops up. Even better is when options come up, okay? But we'll get into options later. So it looks professional and it saves a ton of time, okay? So now why not just go buy a price book? Well, I've bought a few different price books in the past and number one, they're expensive. And number two, none of them have really been, you know, thorough for my area. I always end up having to go back in and change a bunch of stuff and turn this off. And by the time I'm done, I may as well have made my own price book. In fact, that's actually what I've done is that I've bought price books and then I've totally ditched them and I have gone in and built my own. And that allows you to build a price book that is accurate for your area. It's accurate for the way that you want to run your business. And it keeps it way smaller and way more concise and way more efficient, okay? So I'm gonna give you a tour in the next video of my price book and what that looks like so that you guys can get an idea of how maybe you wanna structure your price book. But ultimately, you wanna build your own price book. And once you get into it, you realize it really doesn't take that long. It really isn't that difficult of a process. Okay? I think I built mine in a day. I sat down on a Saturday and I just hashed it out. And it wasn't perfect and I had to go back and fix some stuff, but just that initial point of getting it done is where you wanna get, okay? So in the next video, let's go take a look at what my price book looks like, and then you guys can get to work building your own.

Jered's Pricebook Tour

All right, welcome to my price book. Okay. So I'm just gonna give you guys a tour of my price book. We're gonna go through every single category and show you all the tasks that I've included in my price book. Okay? And honestly, I thought about recreating this in a format where you could just upload it to ServiceTitan. But what I really want you guys to do is look at this just as, you know, to get you started. So you can kind of see what the end result looks like and have an idea of where you need to go. Okay? Mainly because everybody's price book is gonna be a little bit different depending on where they are. So my business is in Alaska. So we deal with different, you know, parts suppliers and and problems getting certain parts or ways of doing things that are gonna be different than where you live. Okay? I visited plumbing shops all over The United States and all of their price books and the way they go about doing their work are a little different. And what you really wanna do is build one that works for you and your area so that when you go to sell your number one, it's a better price book for you. But number two, when you go to sell your business, if you have a

price book that's based off available materials and best practices for your area, it's gonna be worth a lot more to the person buying your business. And whenever we're building something, whenever we're building a business, we wanna build it with the end in mind. So we wanna build it to sell and to maximize the value of the sale. Okay? So it can seem daunting and a little overwhelming to build your own price book, but I promise you it's not as bad as you think. And I want you to keep in mind while you're building it, it doesn't have to be perfect. You can always update and change it. You just need to get something out there that you can get started with. And then when you go out and start using it, you're gonna learn. I think doing this this way would be a much better idea and you can go change your price book. Okay? So without further ado, let's get into this tour. And I was gonna say this is gonna be quick, but I think it's gonna take a little bit to get through. Okay? So bear with me. But I think it's gonna be really valuable for you guys to see this. Okay? So the first section we have here is the admin section. Okay. So you can see we've got, you know, a twenty four hour service fee, which we don't actually do. We've never even used this. We've got some paperwork that we do for our burrow when we do a change out program, some other stuff we do. It's like those aren't gonna be needed for you guys. In here, we throw tasks like concrete cutting. So my guys would select this task. They would just have to adjust the price, edit the description, and then it would show up on the customer's estimate as concrete cutting. Okay? We hire third party concrete cutters to come in and cut concrete. They're super fast. They're super cheap in our area. So we just use them. Okay. Here's a diagnostic. So this is what we use as our diagnostic charge. So if we come to your house and we give you an estimate and we diagnose the problem, but you don't move forward with any of the work, we're gonna charge you \$96 and this is the task we're gonna use. Okay? Diagnostic charge, nonrefundable, includes up to ten minute line of sight inspection of plumbing, mechanical issues, includes professional diagnostic with recommendations. Okay? So we're actually gonna give them an estimate, say here's the recommended fix. If they don't wanna move forward with it, it's \$96. Okay? And you'll find that sometimes customers are like, okay, I need to save up for that. And then you would charge them the \$96 and then they'll come back to it and they'll hire you to do the work. Okay. Let's keep going. Diagnostic waived. So this is a task that we would use anytime we do any work. We don't charge them a diagnostic fee. So we use this task and we put it on the invoice, k, to show that they got the \$96 diagnostic was free. \$0. K? So free ten minute line of sight inspection of plumbing mechanical issues includes professional diagnostic with recommendations. Okay? \$96 value. Thank you for your business. Alright? So that's what we would put on there on every single invoice that goes out. This has one of these line items. Okay? And that does a couple things, and we'll talk about that later. And then we have a discount task. Okay? So if our guys are at a job and the person needs the work done, but they get a little price objection, they always tell the customer. I tell my guys, you can tell them anytime, hey, I'm allowed to give a 10% discount to new customers or I'm allowed to give a 10% discount to existing customers. That will get your bill down to this dollar amount. Does that help out? Would you like to move forward with this work now? Right? So they would enter in how much the discount is. They would select this task and put in negative, you know, whatever. If it was a hundred dollar item, they would go negative \$10. And they tell the customer, hey, I can get you down to to \$90. I'm allowed to give you a 10% returning customer discount. Does that help you out? And you'll find that you sell a lot of work that way. Okay? Then excavation and dirt work, obviously, get another bid for those.

We don't do any of the excavation ourselves. Excavation in Alaska is a big deal because everything is super, super deep because we don't want to freeze. So you've got to have some pretty hefty equipment. And so we, sub that out and then we mark it up and then we resell it. Okay. And then an extended service area. So we have, if we go further out than a certain distance, there's a couple areas of town that my ladies know that, okay, this is gonna be an extended service charge. We just bump that up to \$125 to kinda discourage people calling us too far. But then if they do call us out there, at least we get paid for gas and maybe it'll cover a little bit of expenses, right? Permits. So if we've gotta pull permits, it takes us about two hours. We actually have to fill out paperwork and go manually hand it in, wait for them, and they go manually pick up the permit in our town. So it takes quite a bit of time. So we charge the customer for that. Sheetrock repair. Like if we've got to cut into, you know, a wall and replace a shower valve or, you know, a frost free hose bib or something, then we always we have a, sheetrock repair company that we can call. We tell them how many square foot, what the texture on the wall is, how many walls it is, how many different patches, and they give us a price over the phone. We then double that price and we use this sheetrock repair task. We just change the dollar amount in the task and bid it to the customer to get their sheetrock fixed. Okay. And we usually give them two options. We'll usually say, hey, here's to fix the plumbing. We'll demo the sheetrock. This is without fixing the sheetrock and here's what it costs if you want us to come back and fix the sheetrock. Okay. A lot of times, most people don't want the hassle of having to get their sheetrock repaired. So when you can include that in there, they're really happy that you can do that for them. Okay. And then this last one here is warranty. So if any of my guys got to go back and do a warranty, they'll use this task here. They'll it's always a \$0 amount. And then they usually explain what they had to repair, what went wrong and use that task. Okay. So that's the admin section of my price book. Okay. So let's just keep going here. I'm gonna skip heating. If anybody wants to see heating, they can hop on a call and we can go through the heating one on one of our Zoom calls. Okay. But I'm gonna skip it because most of you guys are only gonna do plumbing. Okay. So then I'm gonna go to my water heater task, and this is gonna be a little bit different than your guys'. A lot of you are probably gonna have electric, you're gonna have gas and you're gonna have indirect. Gas and indirect are things that we don't do a whole lot of in Alaska. The water is typically too cold for indirects, so we can't actually heat it up fast enough to supply, you know, a multi bathroom house. And then we don't have much gas, so we don't do too many gas water heaters. So my guys just bid those differently. We'll go over that as well. But so we have electric water heaters, and we have electric water heaters that are hooked up to people's heating systems. So we do that as well. And then we have indirect water heaters. That's a water heater with a coil in it hooked up to a boiler system. If you're like in the Jersey area or northern areas, you're probably pretty familiar with those. But that's what we have. So I split this into electric repair and electric replace, indirect repair and indirect replace. So if you look on the electric replace, then we've got with sidearm coil or no sidearm coils. We've got a bunch of boilers that have sidearm coils that take quite a bit more piping to hook one of these water heaters up. So we have two options. One includes more parts than the other. So it's more expensive and more time. So I'm gonna go over this one, the no sidearm coil, that'd just be a normal electric water heater. And you can see we've got owner supplied, right? So we've got owner supplied, that's the price. Install owner supplied electric water heater includes all other parts and labor. One year workmanship warranty, no warranty on the water heater because they supplied it, right?

And then we've got good, better and best. Okay. So you always want to offer options and we'll get into that later. There'll be a whole video on offering options. But we offer a good, better, best. So basically up to 50 gallon good. So if it's 50 gallons or less, we'll replace it for this price right here. Okay? And when you're building the task, you know, you have to account for, I think a 40 gallon water heater is actually more expensive than a 50 gallon. So when we build this task, we just use the 40 gallon price to build this task. Okay? So remove and dispose of existing water heater, install new electric water heater with new connections, includes all labor and materials. And I think our better one is let's see. Same thing, but you get new shutoff valves, new hot and cold connections, so it's a little more. And then our best one is actually a Bradford White, glass lined, little more expensive water heater, better in my opinion. Don't fight that. Don't fight me on that. Remove and dispose of existing water heater, install new premium glass lined electric water heater with hydro jet technology. Right? So my guys know to explain that to the customer. And then we also include a video in here for the customer to watch as well. And you can upload those right into service time. Okay. And one thing I forgot to mention is this price book is all in service Titan. And the way you guys are gonna build it is you're gonna build it on a spreadsheet first. And then once you get to service Titan, then you're gonna take your spreadsheet as an outline, and you're gonna go rebuild your price book on service Titan. Okay? If you try to build it all on service Titan, it can get really confusing and hard to think about. But if you can get it all in one spot on a spreadsheet, then, you're gonna have a much easier time. So in the next video is gonna be the spreadsheet on how you're gonna build this, price book. Okay? So that's our electric water heater replace. The repair one is just all the different parts of a water heater. Okay? Aquastat, check valve, element, expansion tank, a rebuild kit, recert pump, smart plugs, supply line, shutoff valve, supply lines, hot and cold, TMP and a thermostat. Okay. And so when you click on these, they all show the price, member price, that's something you can do in service Titan, and then replace TMP relief valve, reconnect drain line, add union if needed, includes all labor materials. Okay. So that's basically all that's in the electric repair, and it's very similar with the indirect repair as well. Just all the parts that would be on an indirect water heater. Okay. So let's go ahead and move on here. So here's our drain cleaning task and we try to keep this as simple as possible. Basically, we've got the different sizes, inch and a half to two inch and three inch to four inch. We only do residential, so we don't do anything bigger than four inch. We don't even have the equipment to do much bigger than four inch, so we just tell them to call somebody else. Then we got the bathtub shower. That's to snake your bathtub and shower. And how we word this is attempt to clear the drain line by running drain snake cable through the pipe. Once drain is clear, technician will attempt to run camera down a larger drain opening nearby if possible to determine the source of the blockage issue. We will record the video on a USB drive and provide this to the customer for their reference. And then we make sure include some warrantied stuff in here because drains can be kind of difficult. So warranty notes, and this is on all of our drain cleans. K? We always say, if possible, we'll run a camera down for free, no charge. We'll give them the video of the camera if they want it. You know, if there's a problem, they probably want it. If there's no problem, they probably don't. And then on the warranty, we always include warranty notes due to the nature of drains and the content of what may make their way inside of them. This service cannot be warrantied. K? So we don't warranty drain claims. There are multiple reasons why we may not be able to put the camera down a drain line, pipe integrity, pipe material, pipe diameter, improper

fittings, etcetera. This decision is made solely by the technician and at his discretion. Okay? So that's what we include in all of our drain cleans. Okay? So we've got inch and a half to two inch, three to four inch. We've got bathtub and shower. We've got camera and open drain line. We get called out all the time just to camera a drain line to see what's in there. We got contact a steam truck. You guys might not have those. We've got steam trucks to come file main main lines. Doing it with a hot jetter or a hydro jet is pretty much impossible at, you know, fifty, sixty below. So we use steam trucks and we actually call them out, get them out there. We, don't pay their bill. That's just to call them and get them on the schedule. Kitchen sink, lavatory, and then we've got snake and jet two inch and under, snake then jet three inch and four inch, and toilet and whole house. And the whole house one is basically, you know, whole house drain clean package includes hydro jet kitchen and main drain, cable, all other drains. Once drain is clear, technician will attempt to run same stuff. Right? So what we typically do, like if we sell them a kitchen sink, we'll say, hey, man, we can run our drain line or we can run our snake down it. If that doesn't clear it out, then the next step is gonna be to do to jet it. Okay. So, next step will cost this much. Okay. So let's try and run our cable down. We'll see how it does. And then if that's the case, then we bump them up to this next task. We don't charge them an additional. This is just their total. Okay? And that's how we do it, guys. So then I split up these from here. I pretty much split these up by room. There's a couple extra, but if you guys can when you're building your price book to split it up in your head in these categories, admin, water heater, drain cleaning, and then go by room, maybe even split some extras off. Like you can see I have toilet here. That just helps you think about it and split it into little pieces. Okay? Little bite sized chunks where you can actually get your price book done over a period of time. Okay? So laundry, let's go in there. You can see we've just got everything you would find in a laundry room. Two way shutoff, deck mount faucet, dryer hose, laundry sink, p trap, shutoff valve, shutoff valve hot and cold, supply line, supply line's hot and cold, Wash machine hoses, wash machine valve, wash machine valve hot and cold, washer box and washer box valves. Okay. Anything they find outside of that, they'll make a custom task for. So then let's move to the kitchen. Kitchen, we've got garbage disposals. We've got three quarter half and one or half three quarter and one, two part kitchen sink waste. Basically, just have all the parts of the sinks, air gap, all the drains under your kitchen sink, basket strainers, extension tailpiece, flange tailpiece, you know, machine hose, ice maker flex, Insta Hot, owner supplied dishwasher, owner supplied garbage disposal, owner supplied kitchen faucet, p trap, you know, rebuild a two handle. This is something that we pretty much never do. Rebuild delta, rebuild moan, rebuild p five p vister. That might make more sense for some of you guys. Honestly, we can never get these cartridges in Alaska, so we rarely sell these. Unless somebody has something that's really unique that they really wanna keep, then we'll go down that rabbit hole. Shutoff valve, shutoff valve hot and cold, single handle with pullout. So this is kind of our good, best. We've got three different faucets they can choose from. Single handle with side sprayer, soap dispenser, one supply line, hot and cold supply lines, and two handle with side sprayer. Alright. Let's just keep going. So then let's go to the bathroom. In the bathroom, I split it up between lav and tub and shower. So lav, you just got your three different styles of faucets. K? Owner supplied center set two handle, and then I think we've got a single single handle down there. P trap, pop up assembly, shut off valve, shut off valve's hot and cold, single handle, there it is, slip joint tailpiece, supply line, supply line's hot and cold, threaded tailpiece, and a widespread faucet. And then tub and shower,

basically all the parts and pieces for a tub and shower. Okay? So install shower valve. This includes cut open drywall to access existing valve. Install basic single handle shower valve, includes all labor and materials. Okay? Does not include drywall patching. Now we may go include that separately in the bid and give them that option as well. So basically overflow gasket, overflow plate, owner supplied shower head, owner supplied shower valve, rebuild one handle, rebuild two handle, rebuild three handle, shower head best, shower head better, shower head good. So we offer three different shower heads, good, better, best. Okay? Spud kit, trip lever, tub spout, waste and overflow. That's it. That's all that's in there. So now let's go back to the next one is toilet. This is where we just have all of our toilet parts. Okay. Fill valve, flapper, flush valve, handle, owner supplied toilet, pressure assist toilet, pull and reset, short slash round front, shut off valve, supply line, tall elongated toilet, whole tank rebuild, toilet seat, toilet support rail, and turbo flush cartridge. Okay? That's all that's in the toilet one. And you can see we've got our good, better, best toilet. So we've got a short round front for a good. A better would be the tall elongated one. That's the one we sell the most of. And the next best would be a pressure assist. So let's move into water main and well. Okay. So this is where you're gonna find all the city water service or, you know, well holding tank situations. Not all of you are gonna have that stuff, but we've got a ton of wells. We've got a ton of holding tanks, and we do our city water service differently. So this isn't really gonna make a ton of sense to you guys. We have lots of requirements on our city water because we don't want it to freeze. So this is basically all the parts and pieces to be able to do a city water service. So if we've gotta go and replace it, we've got, you know, 50 foot and then up to a hundred foot. We've got circ pumps on ours. We actually run two lines in that circulates it to keep it from freezing. So then we've got the different pumps to replace depending on how long your lines are. And that's all there is there. So let's go into well and holding tank. Excuse me. So we've got lots of jet pumps, pressure tanks, all that kind of stuff. So we've got half, three quarter, and one horse jet pumps. We've got all the different sizes of pressure tanks that we can get, check valves. We've got DAB constant pressure pumps. We end up selling a ton of those. And then all the parts that would go on a tank tee, pressure switches. We've got pump tank combos. We see a lot of those in cabins. We see a lot of these in smaller homes. And then again, all the pieces to go on a tank tee. Tank tee, you can get it with all the pieces or you can just buy the whole rebuild kit. Okay. That's about it for there. And then let's see what's next here. Softener and filters. So we offer one style of softener, and then we offer a few, you know, filter type add on stuff. We split this up. We've got double whole house filter. A lot of people need this where we're at. It's a good idea for them. Install water softener. This is to install the water softener that we supply. It comes with a filter. If you wanna upgrade to the double whole house, you can do that as well. And then we've got owner supplied RO. We don't typically stock ROs and none of our supply houses do. So the owners end up usually, you know, ordering them off the Internet and then we'll install them for them. And you can see we've got replace softener. So if they've already got a softener in place, we'll replace it cheaper than we will install a new one because all the plumbing is there, the drains are there, all that good stuff. Then we've got water softener. You get the maintenance. Just changing a filter costs \$6.53 to add on or just to put in one whole house filter and then to add on a filter to the water softener. So if we're just gonna add this in and make it a double whole home filter, that's what it costs to add it into your water softener install. So then let's go back here. Valve and spigot. So this is where all of our valves, cutting the drywall open is a task, putting an access panel in rather

than calling for sheetrock repair. We do a lot of these for shower valves. Even see a lot of these for frost free hose bibs. All our hose bibs have to be frost free, so we just go up to 12 inch, up to 12 inch for the shutoff valve, and then a rebuild. And that's all we do. If it's any longer than that, then we just custom do a custom task. So you can kind of see here, we keep it pretty simple. Okay. And so this is our membership. We're gonna go over memberships in a whole another, deal. So I'm just gonna skip over that. So now here's a really important one is the custom task tab, and you're actually gonna build this out only in service Titan. It doesn't really make sense to build it out on your spreadsheet. So don't build this one out, but, basically, you've got different time frames. So this is what technicians are gonna use when they don't have a task in the price book that makes sense for what they're doing. Okay? They're going to select how long they think it's gonna take them. And we go all the way up to eight hours. Right? They're gonna go, okay, I think this is gonna take me two hours. And then they're gonna select how much the materials are going to cost. Okay? So they're actually gonna call in the parts store, get a quote on the materials, and let's say the materials are \$400. Then this is gonna spit out a task for them where they when they select this task, all they have to do is come down here, and they will edit this description to match what they're gonna be doing and then go present this to the customer. Okay? So this is like any kind of one off weird stuff. That's how they would end up using it. And I would suggest that if you're, actually, let's go over the the dollar amounts. I'll just show you guys the dollar amounts that we used in here. So you guys can just pause this if you wanna see it, come back to it, whatever. I just wanna make sure you see the whole thing. So we go all the way up to 5,000 and that's plenty good. We usually actually instruct our guys if they can to use, you know, if they've got a bunch of work they're gonna do to try to split it up into multiple custom tasks. That way it's split up a little bit for the customer rather than seeing one giant price that comes out of nowhere. So that's what they're gonna use when they go somewhere and it just none of the price book tasks make sense. And I would urge you to keep your price book as simple as possible. So only the things you're gonna be doing daily, okay? Weekly. If you're not doing it on a weekly basis, don't put it in your price book, okay? So let's go over the gas because a lot of you guys are gonna do gas. CSST, my guys actually have to call in and get that bid because the prices on it in Alaska change on it so much. But we actually instruct them to do more mega press black iron because it's just so much more cost effective. So we've got a meter hookup. We've got, paperwork for the our Baroque exchange program, an appliance connection, permitting. Then we have a lot of people that just hook up to propane bottles. So we have a propane bottle hookup. And then we just do it by which size. We typically run three quarter or one inch. If we get over one inch, we'll do it as a custom task because we don't do it that often. Okay? And then under each of these, you can see, we just go to lengths. So up to 20 feet of three quarter, up to 40 feet of three quarter, up to 60 feet of three quarter and up to 80 feet of three quarter. Okay. And then anything outside of 80 feet, then we custom task it. Okay. So we actually call, we get quotes, we think about how long it's gonna take, and then we go from there. But this way you guys can go on-site and go, okay, I've got 40 feet of three quarter gas line to run. Let's select this task. That's going to cost you this much. Okay. And then one inch is the exact same way, same lengths and everything, just one inch. So then let's go back here. And then we've got our bidet section. We do a little bit of bidets, so we have a good, better and a best. And basically we buy the toilet and put the toilet seat on for all of these, and then we'll actually call in. This one requires no power. So I make sure and put that in my thing. No power

required. But then these other two power required, I want my guys to know they're gonna have to call an electrician and get an electrician over there, figure out how to get an outlet in that bathroom if possible. K? And we've done that a lot. We've had an electrician come over. We just double his bid, pay the electrician, the customer pays us, everybody's happy. So that's our bidets. Just offer three of them. We actually sell those quite a bit. It's kinda funny. And then these three, you don't really need to see HRV, new boiler installation. We don't actually do commercial maintenance contracts. I don't know why that's still in there. We tried doing them at one point in time. So if you guys wanna see any of this, then let me know. We'll go over it in a Zoom call. And then troubleshoot, test, inspect. I really like this one because a lot of times we go to somebody's house and it requires more work than just our ten minute diagnostic fee. Right? So we might need to troubleshoot something or test something or run a camera inspection or something like that before we can give them a good bid. So I tell my guys, hey, if it's over ten minutes, you know, if you think you're gonna spend fifteen, thirty, forty five or sixty minutes troubleshooting and testing, you know, maybe you're doing a smoke test or something like that, come in here and select the time frame that you're gonna want. So if they think it's gonna take thirty minutes, then they can come in here and they can decide what they wanna call this task. Okay? Do they wanna call it an inspection? Do they wanna call it a testing? Or do they wanna call it a troubleshooting? And this just helps the customer understand what's going on and helps the bill more accurately reflect the work that you're doing. Okay? So all of these categories have the same inspection, testing, troubleshoot. Okay? It's just a different time frame. Alright? And that's really about it, guys. So you can see how simple this price book is. So then I'm gonna go into a couple of things of how we kind of track, like what's going on. When you build your task, you're gonna build everything with a task code. Okay? So you can see actually, let's do this one. We'll go into the lab one here. You can see I've got LabLAVDash002Dash02Dot00. Okay. So everything in my lab section, the first three letters are LAV. Okay. And then the second two is just to say, okay, this is task number two. Okay. And then these, sorry. And then these last ones here, 02Dot00. That means that it's a two hour task. Okay. So we don't carry these faucets on our truck because it's just not it just doesn't matter for us. So we have time in there to go get them from the parts store. So we gotta go to the parts store, we gotta come back to the house. We've gotta sell the customer on the work. We gotta do the work. We gotta clean up. We gotta build the customer. Takes us about two hours. So that's what we charge the customer. So when you're building your tasks in your price book, you're gonna label everything in LAV, LAV or whatever you want. You can come up with your own numbers, but I like to make it so it's obvious which section it's in. Okay? So LAV, it's task number two, and that's just going to be in the order that you build it in. It doesn't the number of the task doesn't really matter. What matters is that they're different so that when you put them in service type, and then you can go search things by task code. That allows you to run reports, see what you sell the most of, adjust your stock in your vehicles, all that good stuff. So you can see like this is two, this one's four, this one's 20. And this one's only one hour because we're already on-site. The owner already has the faucet. We don't have to go get it. And then you see like a P trap is 005 and it's got a half hour case. So 00.5. Okay. And then you can scroll down here. You can see a supply line, LAV007Dash00.25. So it's only got fifteen minutes to replace that supply line versus if you go over to the hot and cold ones, you've got thirty minutes to replace both hot and cold supply lines. Okay? So that's how you wanna lay out your task codes. So lab is LAV, anything with a tub is TUB, tub. Okay?

And then let's just go check some other ones. Anything in the kitchen is KIT. Okay? You can see KIT. Any admin stuff is ADM. Any drain cleaning stuff is DRN for drain. Okay? Just allows you to accurately identify. Let's check water heater. Anything water heater is WTH. Okay? Let's go back one more. Anything water softener is SFT for softener. Toilet, TLT. K? Water main and well, I think city water service is CTW. City water. Anything for well is w e l for well. Okay. So I can go look up. Okay. How many CTW tasks did we sell last year? How much revenue did CTW do for us? And I can see how much revenue each category did for me year by year so that I can adjust how we stock our trucks and what we advertise for. Okay? So it's a pretty powerful tool to go in and have those task codes. Gas is probably just gonna be gas. Yep, G A S, okay. So now that you guys got a good look at my price book, you can always come back to this video and use it for reference. And hopefully that gives you a good idea of where to get started, what your end result is. I'll see you in the next video where we're actually gonna go over the spreadsheet, where you're gonna start building out these different categories and all the different tasks in the category so that when you get on ServiceTitan, then you can just go take that information and enter it into service titan. See you guys on the next one.

Building Your Price Book

All right, now it's time for the fun stuff for building your price book out in a spreadsheet. Okay? So this is probably the easiest way to build it because you can see everything in one place and then you can go transfer this information over to ServiceTitan. Okay? If you don't have ServiceTitan yet, that's totally fine. We're going to go over a course all about ServiceTitan. And you should already have the hourly rate calculator. So this is just a tab down on the bottom in the hourly rate calculator. Okay. If you don't have this, you can go to the pricing section, and download this. If you haven't gone through the pricing section, then you need to do that first because it's really important. Okay. So and you'll see down here, you've got the hourly rate calculator, you've got your expenses that you've already filled out, and then you have all these tabs down here on the bottom. Okay? And this is just how I split it up in my price book. You're more than welcome to just right click on this and duplicate it, and that will make a new, tab. Then you can right click on it and rename it and rename it the category that you want. Or you can use the ones that I've already prefilled out for you. Okay? Now you're going to go in the admin section. I would start here. I've pre filled out some for you. These are the ones that I know that all of you are going to use just so you can kind of see and get an idea of what it looks like. Okay? So first off, you're gonna name the category. Okay? So this is admin, right? Because it's in the admin tab. In service Titan, you can have categories and then you can have subcategories. So let me show you an example of that. Like in my water heater, water heater would be the category and then these would all be subcategories, okay? So you can have electric replace, you can even have another category under that where then you can have all of your stuff. Okay? So if you want subcategories and that kind of stuff, I would put the subcategories here and then put all your tasks after that subcategory. Okay? Admin, I'm not gonna have any subcategories and I'm just gonna have this here. Okay? So then next is gonna be the task code. And this is where you're gonna do, you know, ADM one, ADM 2, 0 0 3, 0 0 4, 0 0 5, 0 0 6, and on and on and on and on. I will say, I like to use the bigger numbers for, like, warranty. Right? So that way if I wanted to add something in here, I can add three in later. It's kinda up to you. Just do what you wanna do. But basically, you're gonna need a task code. K? And you're gonna

do a DMDash001Dash00Dot50. Okay? So that means this task has thirty minutes attached to it. Okay? And what this does is it allows you to track hours. Okay? Which we'll get into when you get into ServiceTitan. But basically, everything that every task that you do is gonna have a value, an hour value, and you're gonna enter that hour value in over here. So this task code, the last four digits of this task code need to match the amount of hours that you have on the task. K? So you're gonna have task code, task name, then you're gonna do a description, how many hours you have in the task, and then how many materials you're gonna use for that task as well. Okay? So in this instance, with the admin tasks and the diagnostic charge and the wave diagnostic charge, we want to track this thirty minutes here because that is what's going to track your travel time. Okay. So when you go in service Titan, and I'll just show you this. When your guys are out in the field, okay? And they have all these prebuilt tasks, let's just go into an easy one. Let's go to the flapper. So you can see the flapper here, TLT007, it has thirty minutes on the task, okay? So a thirty minute task at my prices at \$5.98 should only be like \$300 plus, you know, \$20 for the flapper. I think a flapper is like \$10. But you can see here it's \$642. So the way ServiceTitan works is you put in a cost for the time that it costs you to travel to the customer's house. Okay? And then every single task, they add in that travel time. But when the technician is there, he can come down here and toggle this little switch called add on item. And you can see, now all of a sudden, lowers the price. And what this add on item does is it takes off the travel time. So when you're thinking about your tasks in your hourly rate calculator here, you only wanna think about the time actually on-site. Okay? But here's the thing. When we're selling all this work, let's say we sell a flapper and a few more tasks, right? One of those tasks needs to be a full price item because we wanna make sure we get paid for the time that it takes us to travel to their house. Okay. So my travel time is set at thirty minutes because that's a little more than average time to get to somebody's house in my area. And so the price of that is just my hourly rate divided by two. So if your hourly rate was 500, then your travel time would cost \$250. Okay? But you wanna be able to track. Okay. I sold 10 tasks on this job. Well, when you add in the task here, the admin task, right? If I was to sell that flapper, then I'm gonna add this task or my technician is gonna add this diagnostic waived task. And you can see here, this diagnostic waived task is worth thirty minutes. Right? So by adding this in, have now tracked, okay, I sold so many hours on this job. Plus I know I sold that thirty minutes of drive time because that's gonna become really important when you go to pull reports from ServiceTitan once you're all set up. You can pull reports and go, how many hours did I sell this week? And you can go back to your hourly calculator and you can say, okay, how much profit did I make this week? Okay. And if you leave out those half hours on every single job when you've got 10 guys running, you're gonna be short on your hours. Okay. Because you actually build out the customer that half hour on that first task. Okay? So just keep that in mind. I want you guys to understand that. So hours here is only time on-site, not including drive time. Okay? So I want you guys to go through these one by one. Admin, I feel a little bit out on your water heater here just to give you guys a better idea. You can see you've got water heater. I have a subcategory of electric. A lot of you are probably gonna have a subcategory of gas. And then you can see here, WTH00100Dot75 thermostat. And I kinda helped you guys with the description here. You wanna use words like, install new professional grade thermostat. K? Includes all labor and materials. And I always include our warranty under there. K? One year parts and labor warranty. Point seven five hours. This matches the task code. Okay? And \$25 in materials. That's how much a thermostat costs us

where I am. So you're gonna go through these and you're just gonna list out every single part you can think of within an electric water heater. Then you're gonna move on to gas. And you're gonna go, okay, what's all the parts for a gas water heater? Like you might wanna go through here and just do the task names first and then go put the codes on it, go put the descriptions and the hours and the materials. It's up to you however you wanna split it up. It just needs to get done. Okay? So then you're gonna move on to the next one. You're gonna do the same thing for drain cleaning. You're going to do the same thing for laundry, kitchen, bathroom, toilet, bidet, water main well, softeners, valve and spigot, gas. If you've got any more, you can add them in here. Okay. So go through, get your price book done. And if you have any questions, hop on a Zoom, one of the Zoom calls and we can get your questions answered, but it should be fairly straightforward at this point. And don't forget, you can go back to the last video and you can watch the tour of my price book if you need to get an idea of, okay, how did Jared lay this out or how should I be thinking about this or what's my end result? Go back to that last video and just check it out. Okay. So dedicate some time, take, sit down at the computer and get this sucker done because it's one of the most important parts of your business. It is the one thing that is really gonna help you, you know, get rid of a lot of your duties as the owner and put a lot of responsibility into your technician's hands, which is then gonna allow you to work on the business instead of in it. And eventually, you're gonna be able to work yourself out of it. Okay? Good luck, guys.

Options

All right, guys. So offering options is gonna be one of the best sales tools that you can have in your arsenal to get your guys to sell well in the field. Okay? But more than sales, it does a lot for your business. Okay? So here's three reasons right here. You know, number one, your customers are used to it. So like when your customers go to the car wash, right? They're presented with options. Okay. So it's something that's familiar to them and they're going to be very familiar with it. Okay. And they like it because it puts the decision back in their court. Right? So they get to decide how they're gonna spend their money rather than you deciding how they should spend their money. All right. So it builds trust in your service in that way. It also provides them with price perspective. Okay. So they get to see, oh, doing this little bit more of a fix is gonna cost me this much money. And they kind of get a perspective shift on what they're spending their money on. Okay? The other thing is that if you don't offer it, you'll never sell it. Okay? So I used to not offer new toilets like ever. And then I pre built options and in a lot of my options, I put new toilet. And all of a sudden I started selling new toilets like crazy. Right? And the reason I never sold them in the past was because I never offered it to the customer. Okay? So if you don't offer it, you're not gonna sell it. So you're gonna wanna build out options. And then when you get onto service Titan, you're gonna pre build those options for your guys. So all they gotta do is click a button and there's gonna be options for every single task for the customer. Okay? So let's go over some of these examples here. So take a look at this. We've got a toilet flapper that's bad. Okay. You go to somebody's house and they've got a toilet flapper. Maybe it's got a crack in it, or it's just wearing out, whatever it's bad and it needs replaced. Okay. And you go to the customer and you say, hey ma'am, your flapper is ultimately what's causing your toilet to leak by. Here's what we can do for you. We've got these three options here, and you're gonna wanna label all your options as good, better, and best. Okay? And you're gonna

go here and you can say, we can replace that flapper, or better yet, we can replace the whole fill valve. You know, it's kind of old, your flapper's old, so the whole valve is kind of old. Or we can go in there and we can do a full rebuild where we replace all the guts in your tank plus get you a new supply line. And honestly, ma'am, I would recommend doing a full rebuild. Here's why. Because your flapper's already worn out. Everything in there is pretty old and super dirty. We can go in there. We can pull it all apart. We can clean it up. We can put all new parts in, and then you won't have to worry about it for a while. Okay? Which option would you like to choose? Right? So now all of a sudden it's given her a choice. Okay. She gets to choose which option she wants. Right. And just by offering this full rebuild, right? Or even recommending it, then you're gonna sell way more of this full rebuild and you're gonna make more money. So then let's add dollar amounts to this. Okay. So let's say a new flapper is \$3.85, a fill valve is \$5.60, but a full rebuild is \$7.20. So you can see in the customer's mind for only like a hundred and \$50 more, they can get all the parts replaced rather than replacing their flapper for just \$3.85. So it seems like a much better deal now to get this full rebuild done. Also, when you see the price tag of \$7.20 for this, you know, all of a sudden this \$3.85 doesn't sound like as much money. Okay. So it provides price perspective for the customer. So they get an idea of what stuff costs and it gives makes this look cheaper and this look like a better deal. And this look like a pretty decent deal, right? So you can see by doing this, right? By offering options, you're gonna sell more of these higher ticket items and you're gonna make more money. Okay. And you're gonna have happier customers because in reality guys, what the customer wants is you to go in there and say, Hey, your flappers what's causing the problem, but all of this stuff is old as well. It's probably gonna go bad and it's super dirty in there. For just a little bit more, we can replace it all, right? That's good customer service. And that's what your customers want because they don't want to have to call you back for a fill valve. Sorry, I put a fill valve here. That should be flush valve. They don't want to have to call you back for a fill valve. Okay. And they don't want to have to call you back for a flex when their flex goes bad. They want to pay you a little bit more money now so that you can fix the whole thing up front because they do not want to call you back. And that's what sets, a professional service apart from the fly by night plumbers. Okay. The fly by night plumbers come in, the one truck chucks in their white van with no decals and no processes and no systems and no iPads. They come in and they say, hey, your flapper's bad. I replaced it. It's \$150. And then two weeks later, their flush valve goes bad or their fill valve goes bad and or their flex goes bad and they have to call the plumber back. They're like, you were just here. And now this is not working properly. They have no idea what they're looking at. Right? And so now they're blaming the other plumber on not fixing everything while they were there. So what they want you to do is offer them options, fix as much as possible, and do the right thing. Now, this is something you're gonna have to train your guys on because what you don't wanna do is go in to there and say, hey, you know, your flapper is what's causing the problem. I can get you a new flush valve, or we can do a full rebuild. Here's the pricing. I recommend the full rebuild. But what if they've already got new parts in there? Right? You don't wanna recommend something that they don't need. So that's the ticket. You wanna train your guys to recommend only what the best option is for the customer. What's the most long term fix for the customer that is something that they actually need. Okay? So if they've got all new parts in their toilet, it's a brand new toilet. Recommending a full rebuild would be kind of ridiculous. So in that sense, would want to say, hey, you know, everything in your toilet is pretty much brand new. I don't know

why this flapper failed so early, but I wouldn't spend the extra money. I would just get this flapper replaced. Okay? So by being honest with the customer, then you build rapport. They're like, oh, cool. They already see the price perspective. So now this flapper doesn't seem as bad. You've told them, hey, this is an option, but I wouldn't do it. So now you seem really honest. And they're gonna say, yeah, go ahead and put that flapper in. Thank you so much. And that's it. And so there's the power of offering options. Okay. So in the next class, we're gonna go over building those options in your price book and how to fill that out. All right. So I'll see you over there.

Building Your Options

Alright, guys. Now that you've got your price book all built out, it's time to go back through and build out your options. K? So we wanna have every single price book task needs to have a good, a better and a best option. Okay? So that when we go to the customer's house, we can present options to the customer and they get to choose how they spend their money. Okay? So I'm in the toilet task on the price book and I have filled out some of this information. This is what my price book looks like. And I'm gonna show you how to go in and do your options, okay? So the tasks here that you've already built, those are all your good options. So all you've got to do is go in and add better and best options. Okay? So if supply line is your good option, then another good option, I'm gonna go over here to h and I'm gonna type better. I'm a hold command. I believe it's shift or control on a PC, not sure. I'm type better and best. Okay. And I'm gonna make this a little longer. So my better option is gonna be, you know, this task code. So I'll just highlight it. I'll go over here. It's going to be that task code. So supply line plus a shutoff valve. So it's going to be, sorry, not equals, Plus. There we go. Plus this task code. K? So I'll just go highlight this task code. I'll come back over here and I'll say, okay, my better option. And I'm actually gonna put equals there. So better is TLT zero zero one plus TLT zero zero two. Okay? That way they get a supply line and a shutoff valve. Makes sense. You're there doing the supply line. Hey. Your shutoff valve is likely old too or possibly old. Let's get that replaced while we're here because to come back and do it later is gonna cost a whole bunch more money. Okay? It's gonna be cheaper for the customer to do it now because they're gonna get this as an add on item. Okay? So then let's figure out our best. So maybe a best option would be supply line shutoff valve plus a tank rebuild. That way the only thing that hasn't been rebuilt is just the brand new toilet or sorry, the toilet. Right? So everything else other than like the porcelain of the toilet is brand new. That way they can be worry free with their toilet as long as they like the porcelain for years to come. So in this case, it would be all of this same stuff. I'm just gonna copy that, come in here, paste it in there. And then plus we would add in the tank rebuild task, right? So now we've got our good, right? This one and our better and our best built out for toilet supply line. Okay. So now let's do it for the shutoff valve. I'll just walk you guys through two of these so you can get an idea. So shutoff valve, the better is gonna be the exact same as the better for the supply line. It's gonna be a supply line and a shutoff valve. And actually, the best is probably gonna be the same option as well. So we could literally just come up here and we could just command c this and command v that. Okay? And then you're gonna have to come in here and edit this one a little bit. So let's get this going down, command enter, and there you go. So now you can see we've got good, better, best built out for this. We've got good, better, best built out for this. Let's see, pull and reset. So if this is our good, they need to pull and reset the toilet. Right? For whatever reason, it's probably

leaking. Well, we could say, okay, this is good. Better one, if we're gonna pull and reset the toilet, we should replace the supply line while we're at it. Because we're gonna have to pull the supply line off and it may, you know, get damaged or it may be old looking and we might as well replace it since we've already got it half off anyways. Right? So we're going to come in here and we're going to go, okay, better equals, and we're going to go this one, pull and reset. Plus a supply line. So command c to copy, command v to paste. Okay? And then so command enter. The best option is probably since we're gonna be pulling and resetting the toilet, let's go ahead and give them a new toilet plus a new flex and a new shutoff valve. That way they know they're good to go on that front. Okay? So then we would go over here and say, okay, best option. Let's give them all of this same stuff up here. So command C, command V, plus we want to add in a supply line or sorry, a shutoff valve. Okay. So then we're going to come in here, command C copy that, come back over here, command V that. Okay. So now we've got our good and our better and our best built out for this task. Okay. So fill valve is going to be real similar. Okay. So we're going to go fill valve, better. I just want to make sure you guys get the idea here. Better is going to be the fill valve plus the flush valve. That's kinda what the rebuild is, so maybe it's gonna be fill valve plus a flapper. Let's do that. I like that. Actually, fill valve yeah. Fill valve plus a flapper makes sense. Right? Because you got fill valve, and the next thing that's gonna be bad is the flapper. So if you can get in there and put a new one on, that'd be pretty cool. So then command enter, and then let's build out our best option. Our best option is probably just gonna be a tank rebuild. Right? So let's go in here and copy this. Bam. So best option is tank rebuild, okay? So we've got good is the fill valve, better is the fill valve plus a flapper. The best option is just to rebuild the entire tank. Okay? So let's go down to flush valve is gonna be very similar except we're gonna go, you know, this is the good. So then we're probably gonna do the flush valve. Plus, flush valve, I would say you should do the flush valve plus probably a supply line because you're gonna be messing with that supply line. So let's go add in a supply line here. So let's grab this code here. And there you go. So that's the better. And then the best again is gonna be the tank rebuild. So we're gonna go best equals this task code here. Okay? There you go. So that's how you guys need to go out and build options. So every single line needs to have a better and a best. Okay? And you can group things together. So like, for example, you know, we grouped a bunch of these together plus on here for the flush valve, the better option was just to go to the tank rebuild. For like your toilets, you're gonna have a good, better, and a best toilet. Right? You're gonna have, you know, maybe a short round front, then you need elongated, you know, tall height, and then maybe a, you know, I don't know, some fancy toilet or something. Right? So come through every single one of your tasks and build options, okay? This is gonna do a bunch for your guys. And then when you get on service Titan, you're gonna be able to go through and easily put these options into service Titan.