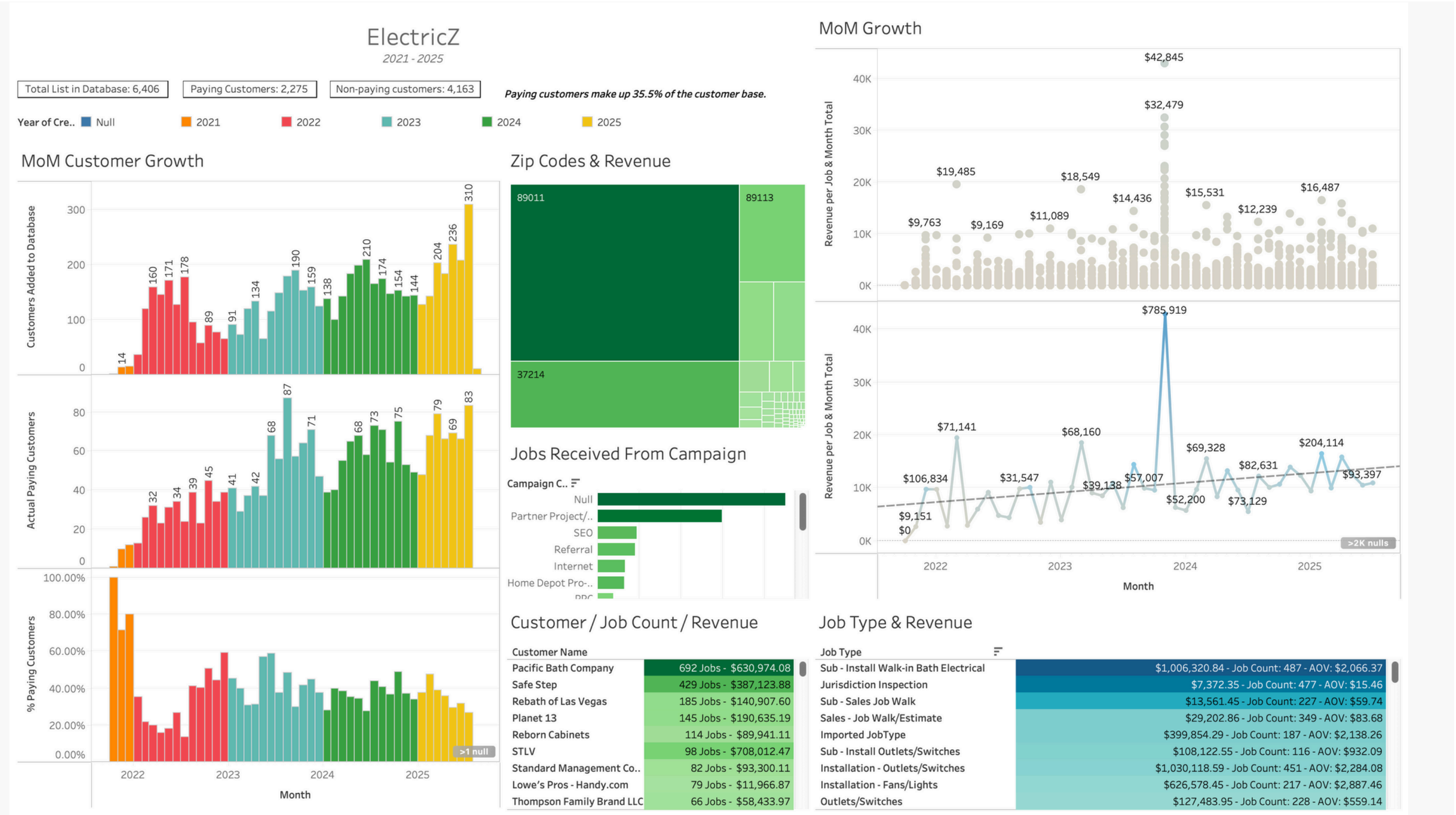


Powering Growth: Customer & Revenue Analysis for Electric-Z

Unlocking ROI & Growth Potential (October 2021 - July 2025)

SERVICE TITAN (CRM)





Electric - Z

AS A GROWING RESIDENTIAL ELECTRICAL SERVICES COMPANY, ELECTRIC-Z IS STEADILY BUILDING ITS CUSTOMER BASE AND JOB VOLUME.

The question we'll answer:

To scale effectively, the team needs clarity on who its customers are, which services drive the most revenue, and where the strongest geographic opportunities exist. Equally important is understanding which referral and campaign sources have historically generated the highest-quality jobs. Without this visibility, decisions about marketing, resource allocation, and service expansion remain based on guesswork rather than data.

The pain points:

- Unclear total customer base and month-to-month new customer growth, making capacity and hiring decisions guesswork.
- No easy breakdown of jobs by service type and margin, so high-value, underbooked services are being missed.
- Geographic performance is opaque — ZIP code revenue and underserved neighborhoods are not mapped into the marketing plan.
- Original campaign source attribution for booked jobs is incomplete, so ROI by channel is unknown. (Many marked as NULL).
- Inconsistent service naming, missing ZIPs, and fragmented CSR assignment fields create messy aggregations.

Why this matters now:

- Data snapshot available from October 2021 through 31 July 2025 gives a recent baseline for an immediate growth plan. (prior to Oct 2021 it was a different CRM used.)
- With ~11,000 rows to work from, there's enough volume to detect meaningful patterns by service, CSR, and geography.
- Fixing joins and attribution now lets Electric-Z prioritize high-value services, tighten marketing spend, and scale field capacity where it will make the biggest revenue impact.

To solve this challenge we'll analyze month over month performance across customers, jobs, services, CSRs, and geography — and attribute job volume back to original campaign sources where possible.

OUR APPROACH:

- 1** Understanding The Business Problem
- 2** Tools & Strategies
- 3** Key Questions Addressed
- 4** Insights & Recommendations

1

Understanding The Business Problem

After establishing itself as a reliable service provider in the electrical space, Electric-Z is looking to sharpen its understanding of customers, services, and revenue drivers. With thousands of jobs completed and a growing customer database, the team needs clarity on where growth is happening, which services and geographies are most profitable, and how marketing sources contribute to job bookings. Their goals include maximizing customer lifetime value, identifying top-performing services and regions, and ensuring that new customer acquisition translates into repeat business and sustainable revenue.

2

Tools & Strategies

We collected and analyzed customer and job data from the Customer List and the Job Detail by CSR, totaling ~11,000 rows. To merge the datasets, we joined on customer name (since Customer ID is missing) - This allowed us to track month-over-month performance, breaking down customer acquisition, repeat rates, job volume, service mix, CSR contribution, and geographic distribution. We also added attribution analysis to uncover which original campaign sources generated the most jobs.

3

Key Questions Addressed

Our analysis focused on uncovering insights to guide growth decisions, including:

- How many unique customers exist, and how many are new vs. returning each month?
- What is the overall job volume trend — growth, flat, or seasonal?
- Which services generate the most bookings and the most revenue?
- Which ZIP codes drive the most jobs and revenue, and which are underserved?
- How do customer registrations compare to jobs completed? Are there gaps?
- Which original campaign sources contribute the most jobs and revenue?

4

Insights & Recommendations

By analyzing customers, jobs, and revenue patterns, we can surface actionable strategies such as:

- Identifying the strongest customer segments (repeat vs. new) to prioritize retention or acquisition.
- Highlighting the services that generate the most revenue and uncovering underbooked, high-margin opportunities.
- Mapping ZIP codes to locate high-performing regions while identifying underserved areas for targeted campaigns.
- Pinpointing which campaign sources are driving quality jobs, allowing Electric-Z to double down on the most effective channels.
- Creating a clearer connection between customer registration and job completion, closing gaps in conversion.



Downloading Customer Data in Service Titan

Customer data is stored in a main table that records all customer information, the date they were added, and the campaign source (e.g., SEO, Ads). However, not every entry in this table represents a paying customer — many are bad leads, incorrect information, or spam from form submissions. To track actual revenue-generating activity, there is a separate sheet that logs completed jobs per customer, including the date each job was dispatched.

Customer Name	Email	Zip Code	City	Customer ID	Created On	Type	Phone Number	Full Address	Last Job Completed	Do Not Mail	Do Not Service
STLV	bswift@mjbhub.com, mfriedman@mjbh	89113	Las Vegas	32521723	11/11/2023	Residential	(925) 497-3847, (301) 367	99 Spanish Gate Drive, Las Vegas, NV 89	7/31/2025	FALSE	FALSE
Pacific Bath Company	lasvegasinvoice@pacificbath.com, ap@	89011	Henderson	11501596		Commercial	(702) 997-0688, (702) 24	5 7360 Eastgate Road #100, Henderson, N	8/1/2025	FALSE	FALSE
Safe Step	michelle.johnson@safesteptub.com, si	37214	Nashville	11501628		Commercial	(615) 690-6644, (615) 927	520 Royal Parkway #100, Nashville, TN 3	12/7/2023	FALSE	FALSE
Planet 13	chris@planet13lasvegas.com, JKille@P	89118	Las Vegas	11501602		Commercial	(702) 769-3893, (740) 851	4675 West Teco Avenue #250, Las Vegas	1/10/2024	FALSE	FALSE
Rebath of Las Vegas	accounting.2335@rebath.com, ben.wel	89120	Las Vegas	11501609		Commercial	(702) 861-8337, (702) 83	2 3655 East Patrick Lane #200, Las Vegas,	8/2/2025	FALSE	FALSE
Craters & Freighters	jose@gocraters.com, Deya@GOCRATE	89119	Las Vegas	11501468		Commercial	(702) 960-7301, (702) 96	1650 East Helm Avenue, Las Vegas, NV 8	5/20/2025	FALSE	FALSE
Addison, Inc.	egunol@addisoninc.com, ap@addisoni	89118	Las Vegas	11501425		Commercial	(702) 347-0621, (775) 35	4 5920 South Rainbow Boulevard #3, Las \	6/2/2022	FALSE	FALSE
Standard Management C	traines@standardmanagement.com, cv	90045	Los Angeles	16199794	12/4/2021	Commercial	(702) 361-8822, (702) 52	5 5711 West Century Boulevard #1010, Lc	8/1/2025	FALSE	FALSE
Reborn Cabinets	crodriguez@reborncabinets.com, ANar	92806	Anaheim	11501611		Commercial	(657) 468-4406, (714) 507	2981 East La Palma Avenue, Anaheim, C	7/1/2025	FALSE	FALSE
Anthem 11	bswift@mjbhub.com	89052	Henderson	31574004	8/26/2023	Residential	(424) 341-9634, (818) 38	4 11 Anthem Pointe Court, Henderson, NV	10/12/2024	FALSE	FALSE
Thompson Family Brand	support@thompsonbath.com, krista@tf	84780	Washington	24307826	10/11/2022	Commercial	(435) 674-5138, (702) 32	2 1186 South Hillcrest Drive, Washington	7/25/2025	FALSE	FALSE



Downloading Detailed Jobs Data in Service Titan

In this separate table, detailed job data is recorded, including revenue, customer name, location, first dispatch date, last job date, and more. This dataset allows us to analyze when each job was completed, the value of the job, how often a customer returned for additional work, and even the CSR who handled the call—useful for evaluating sales rep performance.

Phone Number	Full Address	Last Job Completed	Do Not Mail	Do Not Service	Customer Tags	Customers Lifetime Revenue	Lifetime Jobs Compl	Lifetime Invoices	Member Status	Original Campaign
497-3847, (301) 367	99 Spanish Gate Drive, Las Vegas, NV 89103	7/31/2025	FALSE	FALSE		\$708012.47	98	105	Active	Recurring Customer
997-0688, (702) 245	7360 Eastgate Road #100, Henderson, NV 89002	8/1/2025	FALSE	FALSE	Partner , Walk-In Bath	\$630973.09	692	741	Inactive	Imported Campaign
690-6644, (615) 927	520 Royal Parkway #100, Nashville, TN 37203	12/7/2023	FALSE	FALSE	Partner , Walk-In Bath	\$385853.89	429	466	Inactive	Imported Campaign
769-3893, (740) 851	4675 West Teco Avenue #250, Las Vegas, NV 89103	1/10/2024	FALSE	FALSE	V.I.P Panel Diagnostic C	\$183204.83	145	155	Inactive	Imported Campaign
861-8337, (702) 832	3655 East Patrick Lane #200, Las Vegas, NV 89103	8/2/2025	FALSE	FALSE		\$140677.60	185	198	Inactive	Imported Campaign
960-7301, (702) 960	1650 East Helm Avenue, Las Vegas, NV 89103	5/20/2025	FALSE	FALSE		\$103968.90	38	39	Inactive	Imported Campaign
347-0621, (775) 354	5920 South Rainbow Boulevard #3, Las Vegas, NV 89103	6/2/2022	FALSE	FALSE		\$95577.73	25	27	Inactive	Imported Campaign
361-8822, (702) 525	5711 West Century Boulevard #1010, Las Vegas, NV 89103	8/1/2025	FALSE	FALSE	Commercial Electrical	\$93300.11	82	90	Inactive	Referral (Word of Mouth)
468-4406, (714) 507	2981 East La Palma Avenue, Anaheim, CA 92705	7/1/2025	FALSE	FALSE	Partner	\$87841.11	114	127	Inactive	Imported Campaign
341-9634, (818) 384	11 Anthem Pointe Court, Henderson, NV 89103	10/12/2024	FALSE	FALSE		\$78408.97	33	41	Active	Web SEO
674-5138, (702) 325	1186 South Hillcrest Drive, Washington, NV 89103	7/25/2025	FALSE	FALSE	Partner , Walk-In Bath	\$58189.24	66	71	Inactive	WIB Partner
		9/22/2020	FALSE	FALSE		\$47173.70	42	42	Inactive	Imported Campaign
233-5420, (650) 665	5173 Supai Drive, Las Vegas, NV 89103	1/1/2025	FALSE	FALSE		\$44413.78	27	34	Inactive	Referral (Word of Mouth)
858-8767, (702) 965	6151 Mcleod Street #Suite A, Las Vegas, NV 89103	6/13/2025	FALSE	FALSE		\$41716.98	17	21	Inactive	Google Local Services Ads
756-2785	502 Beneficial Place, Henderson, NV 89103	7/12/2025	FALSE	FALSE		\$37880.34	11	17	Active	Web SEO
595-2543	101 South Rancho Drive, Las Vegas, NV 89103	8/1/2025	FALSE	FALSE		\$31097.89	9	9	Inactive	Vital Storm PPC
353-5327, (702) 245	6217 Rocky Mountain Avenue, Las Vegas, NV 89103	2/27/2024	FALSE	FALSE		\$30729.48	9	11	Inactive	Door Hanger Service Request

Job #	Invoice #	Job Type	Customer Name	Location Address	Customer Phone	Summary	First Dispatch	Status	Job Campaign	Jobs Total	Prevailing Wa	Campaign Ca	Jobory
52107077	52107077	Installation - Elec	William Matzek	2289 Ray Kanel Drive,	7028101699	Ac unit junction b	6/25/2025	Completed	Recurring Custome	\$1179.28	FALSE		
45281042	45281042	Sales - Fans/Ligh	Kristi Moore	286 Shaded Canyon D	8584729230	Agreed to \$29 ser	2/12/2025	Completed	Google Local Servic	\$0.00	FALSE	Internet	
45275598	45275598	Installation - Fan	Kristi Moore	286 Shaded Canyon D	8584729230	Installation	2/13/2025	Completed	Google Local Servic	\$3662.75	FALSE	Internet	
45275042	45275042	Sub - Sales Job W	Reborn Cabinets	4860 East Colorado Av	3235341208, 4023160	Cap off electrical	2/25/2025	Completed	WIB Partner	\$0.00	FALSE	Partner Project/Job	
49851420	49851420	Sub - Install Outl	Reborn Cabinets	4860 East Colorado Av	3235341208, 4023160	Delete and move	2/25/2025	Completed	WIB Partner	\$528.98	FALSE	Partner Project/Job	
49628306	49628306	Sales - Critical H	Amber & Henry Mayn	8701 Cremona Drive,	3522075684, 9542358	Pease collect Em	2/15/2025	Completed	WIB Partner	\$0.00	FALSE	Partner Project/Job	
49686828	49686828	Installation - Out	Amber & Henry Mayn	8701 Cremona Drive,	3522075684, 9542358	yThis would be to	2/15/2025	Completed	WIB Partner	\$311.29	FALSE	Partner Project/Job	
49866259	49866259	Installation - Out	Ralph & Denise Garc	9075 Wing Shadow Cii	6198559912, 6198959	Installation of a s	3/5/2025	Completed	Referral (Word of M	\$1629.90	FALSE	Referral	
49631005	49631005	Sales - Outlets/S	Ralph & Denise Garc	9075 Wing Shadow Cii	6198559912, 6198959	Load calculation	2/16/2025	Completed	Referral (Word of M	\$0.00	FALSE	Referral	
50961684	50961684	Installation - Out	Ralph & Denise Garc	9075 Wing Shadow Cii	6198559912, 6198959	Progress invoice	4/26/2025	Completed	Referral (Word of M	\$6000.00	FALSE	Referral	
49646230	49646230	Sales - Critical H	Richard Samanich	3720 Cima Drive, Nort	7024297458, 7026462	HF BOOKED Do y	2/20/2025	Completed	WIB Partner	\$0.00	FALSE	Partner Project/Job	



Joining The Tables

Since a unique Customer ID is not available, both tables were joined using the customer name as the matching key.

This provides a unified view of the customer journey—showing when a customer was first added to the database, when their first job was dispatched, and the total revenue generated. Each subsequent job performed by the customer is also captured with full details.

Order #	Email	Zip Code	City	Customer ID	Created On	Type	Job Name	Full Address	Last Job Completed	Is Not Made	Not Serviced	Customer Type	Lifetime	Lifetime Jobs Completed	Time Invoiced	Number of Jobs	Original Campaign	Booked By	Job #	Invoice #	Job Type	Location Address	Customer Phone	Summary	First Dispatch	Status	Job Campaign	Jobs Total	Prevailing Wage	Campaign Category	Customers w/ At Least 1 Job
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Jilban Fakas	52597753	52597753	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	5 ceiling fans 4 can lights and two whole home redevic	2023-10-01 00:00:00	Completed	Recurring Customer	\$16,924.98	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Jilban Fakas	52598395	52598395	Service - C	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Two 50 amp dedicated outlets that will be ran for temporary power for hookups to two RV homes. This will co	2023-11-30 00:00:00	Completed	Recurring Customer	\$ 6,982.80	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Harrison Fakas	52810491	52810491	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Adding in outlets for upstairs that will power all tvs on walls as well as anything else needed. 10 medium boxes	2023-12-06 00:00:00	Completed	Recurring Customer	\$12,729.88	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Scott Iann	52764018	52764018	Service - C	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Delux Invoic Re-hang		Completed	Recurring Customer	\$ 2,037.81	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Harrison Fakas	52838899	52838899	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	This will cover guest villa, main house that will redone for now as well as guest house next to it with security	2023-12-09 00:00:00	Completed	Recurring Customer	\$17,929.06	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Jilban Fakas	52870988	52870988	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	This package includes two separate runs, one on each side of the property or two separate teils chargers. The	2023-12-12 00:00:00	Completed	Recurring Customer	\$ 9,109.87	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Harrison Fakas	52760946	52760946	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Adding 20 recessed led lights three ceiling fans and removing and deleting outlets as well as adding in and mov	2023-12-02 00:00:00	Completed	Recurring Customer	\$11,809.87	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Harrison Fakas	52516236	52516236	Sales - Out	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	CHSC and look at possible (3) RV hook-ups	2023-11-16 00:00:00	Completed	Recurring Customer	\$ -	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Harrison Fakas	52975090	52975090	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	We will be replacing all the lights in bathrooms and caits. As well as adding ceiling fans in both bedrooms	2023-12-21 00:00:00	Completed	Recurring Customer	\$22,227.67	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Harrison Fakas	52963992	52963992	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Panish that needs to be rejuvenated are off of panel Carriage House that feed EC, CA AND CB as well as guard s	2023-12-21 00:00:00	Completed	Recurring Customer	\$17,773.47	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Scott Iann	53409837	53409837	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Complete	2024-01-23 00:00:00	Completed	Recurring Customer	\$ 1,219.76	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Scott Iann	53410093	53410093	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Guest house B is going to get a whole home re-device, as well as arc fault outlets since we can't install arc fault	2024-01-25 00:00:00	Completed	Recurring Customer	\$27,009.51	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Scott Iann	53410733	53410733	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Installing a new heavy duty sprinkler box that will be able to be ran over by ATVs as well as trucks. This will com	2024-01-31 00:00:00	Completed	Recurring Customer	\$ 7,797.83	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Scott Iann	53343917	53343917	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	working lights 5	2024-01-18 00:00:00	Completed	Recurring Customer	\$ 2,782.60	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Jilban Fakas	53313204	53313204	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	I will need three tandem breakers so I can create more space on the 208 3 phase system and more 6 breake	2024-01-17 00:00:00	Completed	Recurring Customer	\$ 1,630.02	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Jilban Fakas	53264943	53264943	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	This will be a high diff. city install with holes cut so as needed to get from the first floor up into the second floor	2024-01-12 00:00:00	Completed	Recurring Customer	\$10,696.12	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Harrison Fakas	53087360	53087360	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Sub-panel and main panel for breaker rejuvenation to replace old sticking breakers to keep up and renew ma	2024-01-06 00:00:00	Completed	Recurring Customer	\$23,148.05	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Jilban Fakas	54404271	54404271	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	5 boxes that were removed and replaced to fit on top of counter tops. Above back splash.	2024-01-26 00:00:00	Completed	Recurring Customer	\$ 1,381.98	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Jilban Fakas	53409455	53409455	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Pouring another way to another light in the east side of the closet because of the cabinets making it's super di	2024-01-23 00:00:00	Completed	Recurring Customer	\$ 1,028.96	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Jilban Fakas	54462944	54462944	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Removing 17 door lights that don't work and are hot with troubling shooting to leave in save conditions.	2024-01-31 00:00:00	Completed	Recurring Customer	\$ 2,300.74	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Scott Iann	54524490	54524490	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	We propose to supply all labor, materials, and equipment to perform the following electrical services at year n	2024-02-09 00:00:00	Completed	Recurring Customer	\$32,479.41	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Scott Iann	54534064	54534064	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	This will be for the main panel as well as sub-panel. Re-breaker and panel clean up will also come with our pane	2024-02-06 00:00:00	Completed	Recurring Customer	\$14,828.19	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Scott Iann	54536612	54536612	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	We will be deleting outdoor lights in the garden area for a count of 90 on the south side of guest Villa A. I'll walk	2024-02-07 00:00:00	Completed	Recurring Customer	\$ 6,828.02	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Harrison Fakas	5478317	5478317	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	***TENTATIVE DATE PENDING PARTS***Site lighting on AR as well as in the carriage house are having proble	2024-03-14 00:00:00	Completed	Recurring Customer	\$ 7,685.21	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Harrison Fakas	5476141	5476141	Service - C	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Wire deletion for outdoor lights with troubleshooting	2024-02-22 00:00:00	Completed	Recurring Customer	\$ 830.97	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Jilban Fakas	55364147	55364147	Sales - Fas	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Lighting walk for B&B buildings with Bailey	2024-02-15 00:00:00	Completed	Recurring Customer	\$ -	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Scott Iann	54588113	54588113	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	ARMS Main Breakers	2024-02-10 00:00:00	Completed	Recurring Customer	\$ 5,869.56	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Jilban Fakas	55374903	55374903	Service - F	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	We ordered 200 light bulbs for the whole property that are specifically for the low volt lights that are specia	2024-02-17 00:00:00	Completed	Recurring Customer	\$ 3,202.82	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Jilban Fakas	60597660	60597660	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Outside in the mechanical room it's been wired up to be hard wired, I'll be checking the line that it is on and ad	2024-09-17 00:00:00	Completed	Recurring Customer	\$ 322.74	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Harrison Fakas	60043602	60043602	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	This package is to cover new pool lighting to be installed outside. Two different sections for the house will be c	2024-08-28 00:00:00	Completed	Recurring Customer	\$27,366.48	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Harrison Fakas	60315428	60315428	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Address grounding bars and Polaris lags to fix unforeseen wiring problems. This will include the wiring added into panels to derate wire size	Completed	Recurring Customer	\$ 884.09	0	Yes							
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Jilban Fakas	59825993	59825993	Sales - Job	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Property site walk to gather information and extent of electrical job/project. Customer who can approve the	2024-07-31 00:00:00	Completed	Recurring Customer	\$ -	0	Yes						
FLV	bswft@mhub.com, n.99113	Las Vegas	32521723	Residential	(925) 497-99 Spanish Gate Drive, Las Vegas, NV 89113 USA	FALSE	FALSE	708012.5	98	105	Active	Recurring Customer	Scott Iann	59870753	59870753	Installer	99 Spanish Gate Drive, Las Vegas, NV 89113 USA	30136721	Dog Fence	2024-08-03 00:00:00	Completed	Recurring Customer	\$ 1,074.26	0	Yes						

Q - WHICH UNDERBOOKED JOB ACTUALLY COMES WITH A HIGH AOV?

Purpose: To identify hidden opportunities. Even if a job isn't booked frequently, a high AOV means it has strong revenue potential.

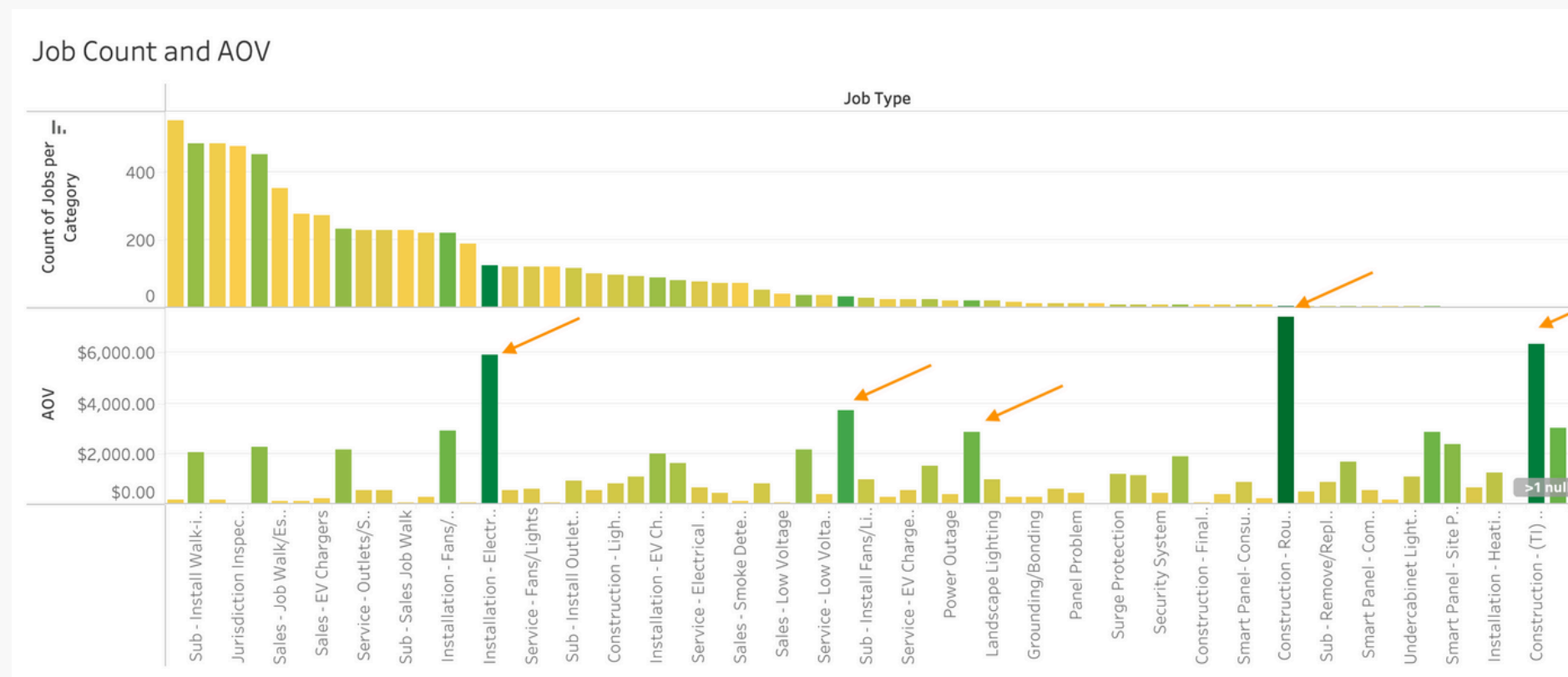


Recommendation

Jobs like Electrical Panel Installation, Whole Home Surge Protection, and Construction (Rough/TI) are underbooked but carry higher order values.

- Construction jobs → focus on B2B (contractors, developers).
- Electrical/surge jobs → market to homeowners with safety messaging.

Run targeted campaigns (contractor partnerships for B2B, safety-focused ads for retail) to increase bookings in these categories.



Q - ARE THERE PATTERNS OF SEASONALITY FOR THE BUSINESS AS A WHOLE?

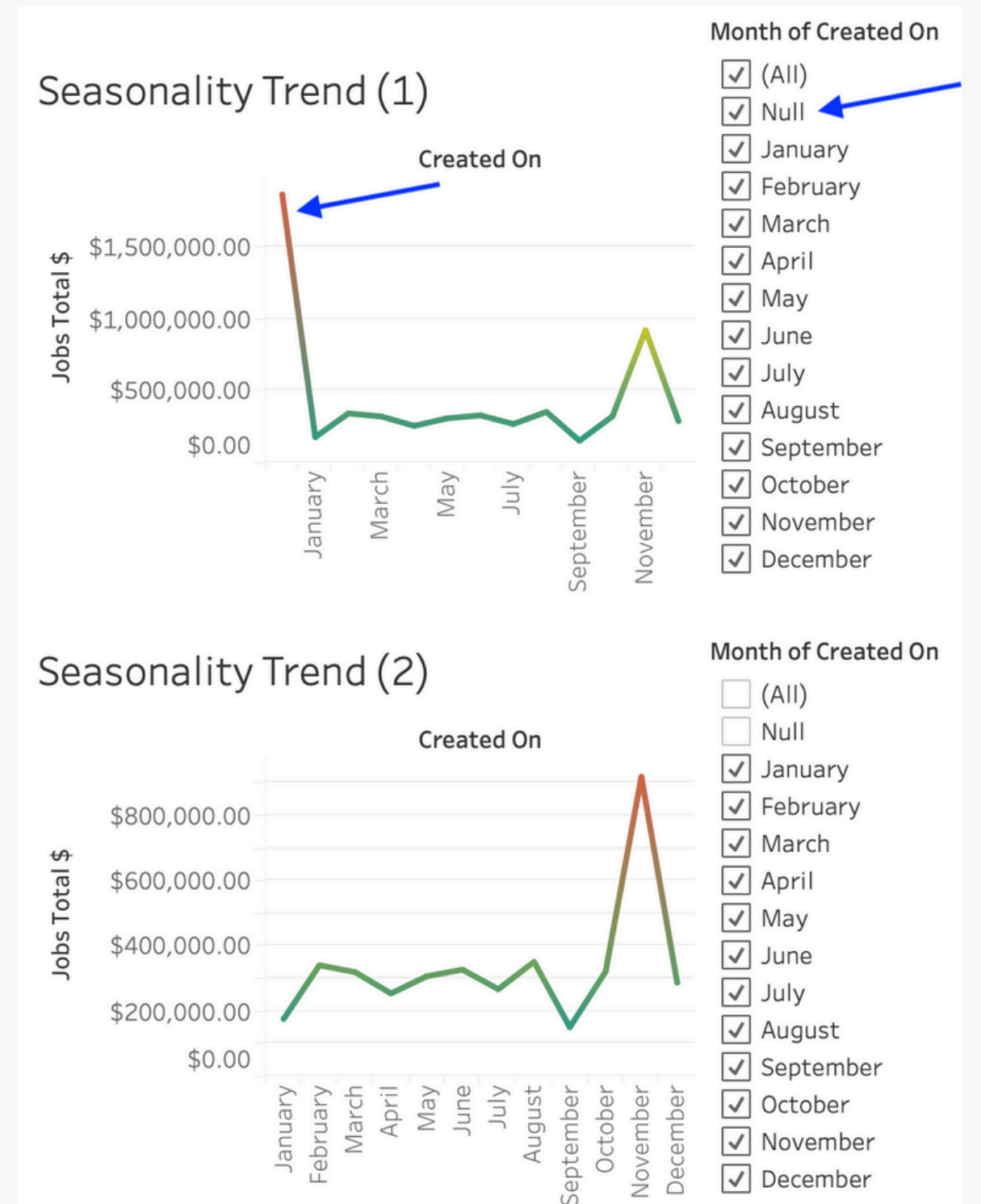
Purpose: Identify when demand naturally rises or falls (e.g., summer vs. winter, holidays, peak construction months).



Recommendation

We added two charts: one excluding null values (which represented sales accumulated prior to October 2021 during the Service Titan migration). Based on the second chart, November shows the annual sales peak, while January and September are consistently the slowest months. To help balance sales, perks or promotions could be offered as summer ends and colder months approach. Seasonal services like heater maintenance or hot water system checks can be marketed to homeowners during this period.

Launch a late-summer/early-fall campaign highlighting cold-weather prep (heater tune-ups, hot water inspections, surge protection against winter storms). This creates urgency before demand naturally drops, helping smooth out revenue during slower months.

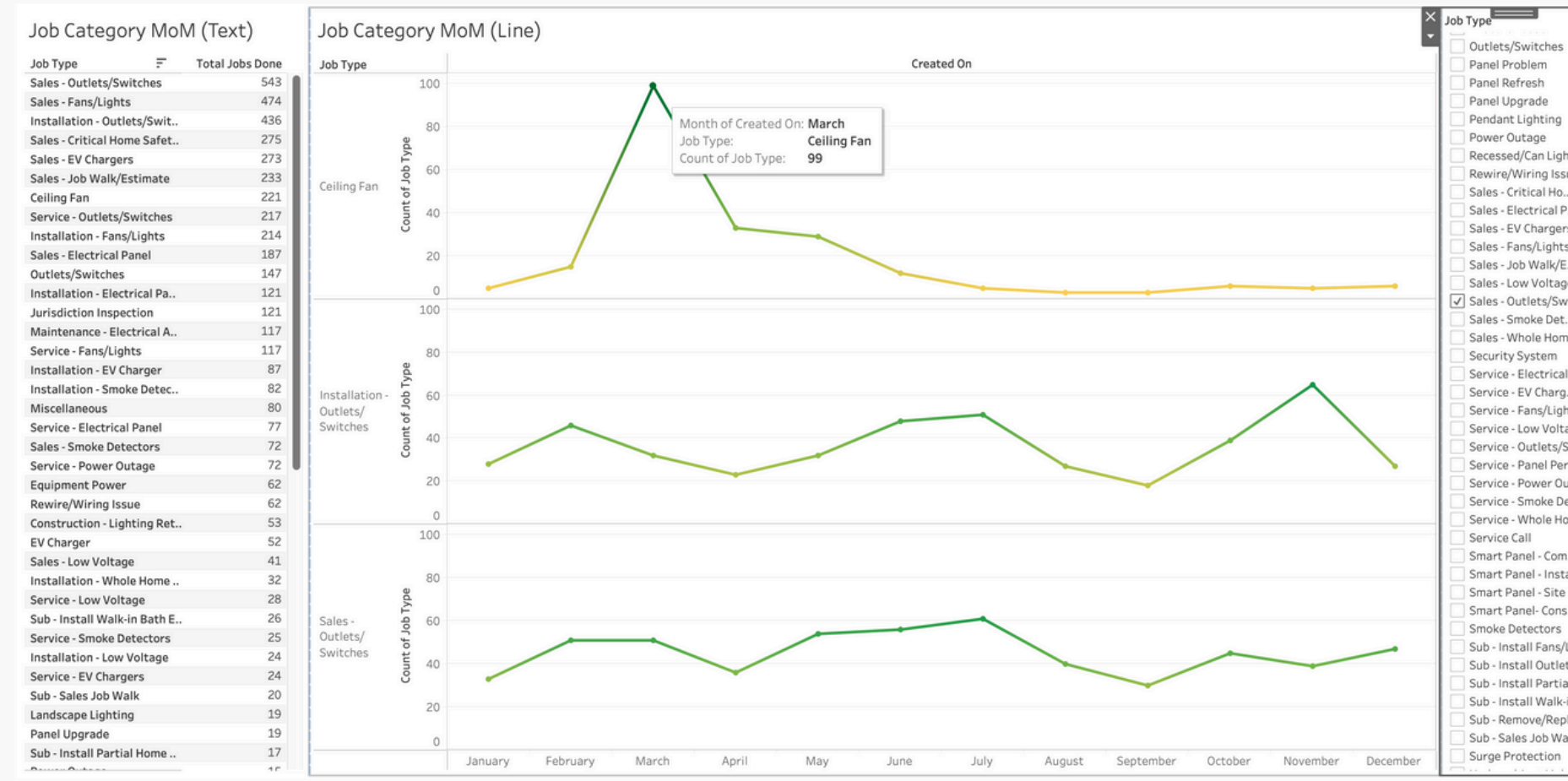


Q - WHAT ARE THE MONTHLY TRENDS IN JOB VOLUME PER CATEGORY AND REVENUE?

Purpose: Identify which categories are seasonal vs. steady.



Recommendation



Observing each job's demand month over month allows us to anticipate spikes and act early. For example, ceiling fan installations consistently surge in March (2021-2025). Running ads, promotions, or seasonal campaigns leading into March would help capture this demand.

Build a marketing calendar aligned with historical demand trends. For recurring spikes like ceiling fans in March, launch campaigns 4-6 weeks beforehand, bundle with related services (e.g., lighting upgrades), and ensure staffing capacity to maximize revenue during peak months.

Q - WHICH ZIP CODES ARE UNDERSERVED BUT NEEDS TO BE FOCUSED MORE?

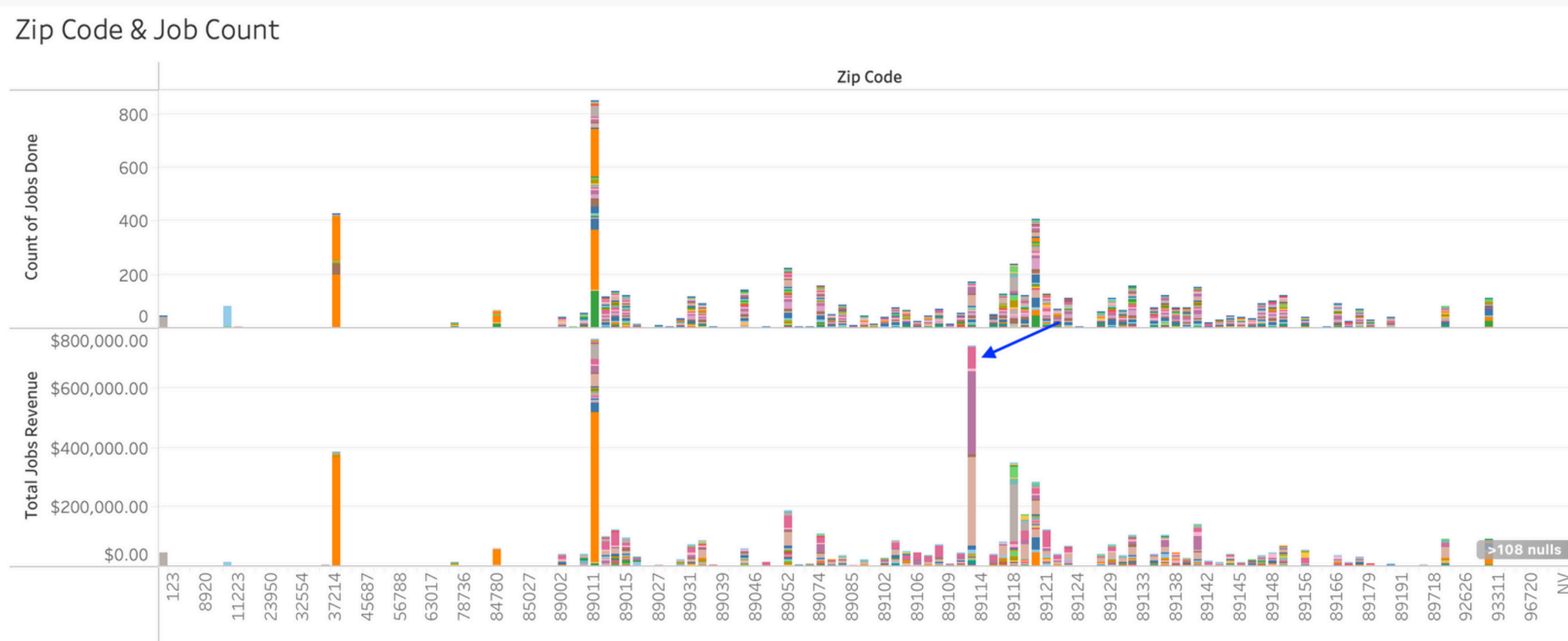
Purpose: Identify geographic areas where job volume is low compared to market potential.



Recommendation

Analyzing job counts and AOV by zip code shows that 89113 stands out as an anomaly: it has one of the lowest job counts but ranks second in total revenue. This suggests it could be an affluent neighborhood where customers are willing to spend more per job. Increasing penetration here could yield strong returns. Offline efforts such as distributing brochures door-to-door may help raise awareness.

Combine offline outreach with digital targeting—run localized Google/Facebook ads geofenced to 89113, highlight premium services in messaging, and offer referral incentives to existing customers in the area.



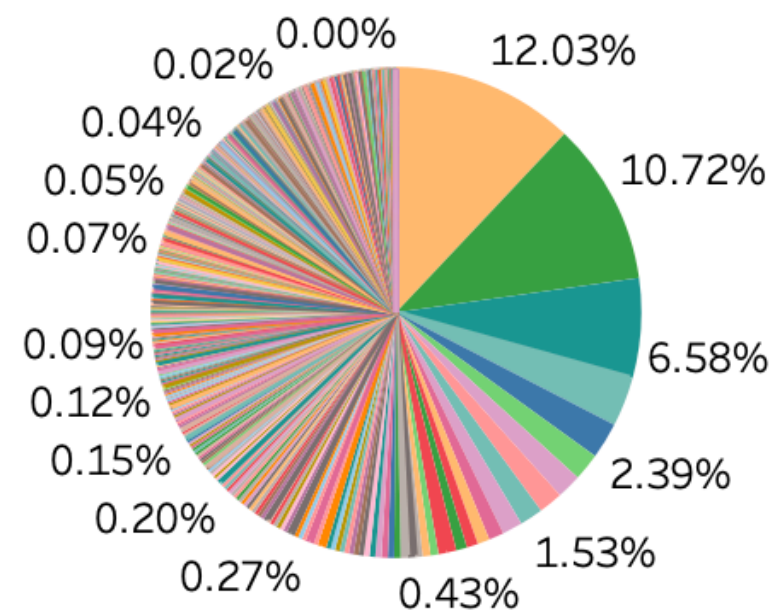
Q - WHAT'S THE REVENUE DISTRIBUTION PIE PER CUSTOMER?

Purpose: Identify high-value customers who drive a large portion of revenue.



Recommendation

Customer & Revenue Pie



It appears that a few B2B customers—STLV, Pacific Bath, and Safe Step—account for nearly 30% of total revenue. While this provides a steady and reliable income stream, it's reassuring that the remaining revenue is distributed across many smaller customers, reducing the risk of over-dependence on just a few clients. These figures are based on accumulated revenue per customer over time.

Maintain strong relationships with these key B2B partners while continuing to nurture smaller customers. Consider strategies to grow mid-tier clients, diversify revenue sources, and reduce potential risk if any major client reduces business in the future.

Q - HOW MANY CUSTOMERS HAVE ACTUALLY MADE A PURCHASE?

Purpose: Determine the conversion from leads to revenue-generating customers.



Recommendation

Paying customers account for 35.5% of the total database added to Service Titan, while the remaining 64.5% did not convert, mainly due to low-quality leads. Currently, not every customer's campaign source can be tracked, which limits the ability to identify which campaigns generate higher-quality leads.

Implement a more robust tracking system to capture the source of every lead. This will allow you to analyze campaign performance, focus marketing spend on high-converting channels, and reduce acquisition of low-quality leads, ultimately improving the overall conversion rate.

Total List in Database: 6,406

Paying Customers: 2,275

Non-paying customers: 4,163

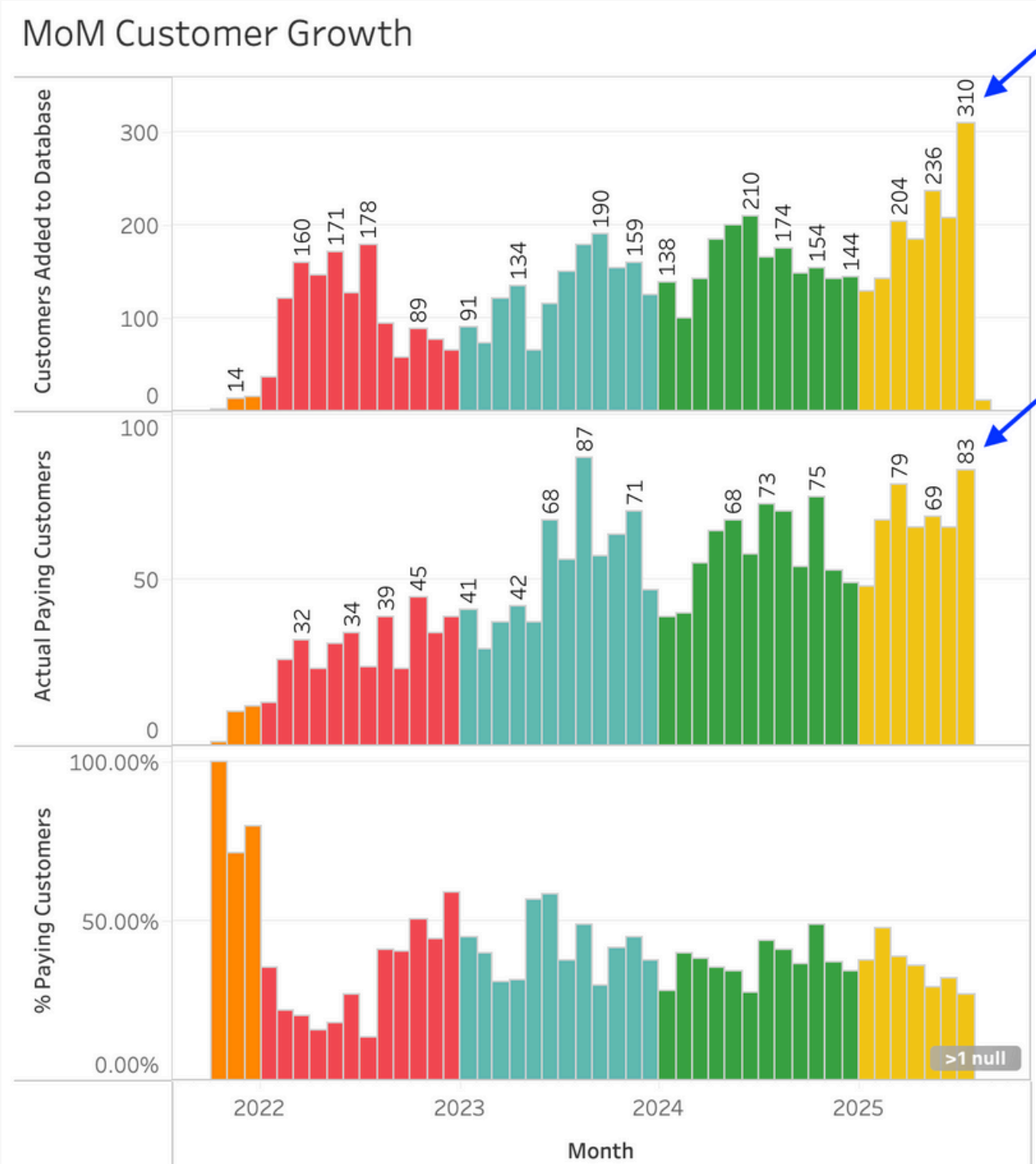
Paying customers make up 35.5% of the customer base.

Q - WHAT IS THE MONTHLY GROWTH OF OUR CUSTOMER BASE?

Purpose: Support forecasting and resource planning, such as staffing, inventory, or budget allocation.



Recommendation



For example, in July 2025, 310 new customers were added, and 83 of them made their first transaction. Overall, the trend is upward, with Electric-Z showing positive growth in customer acquisition.

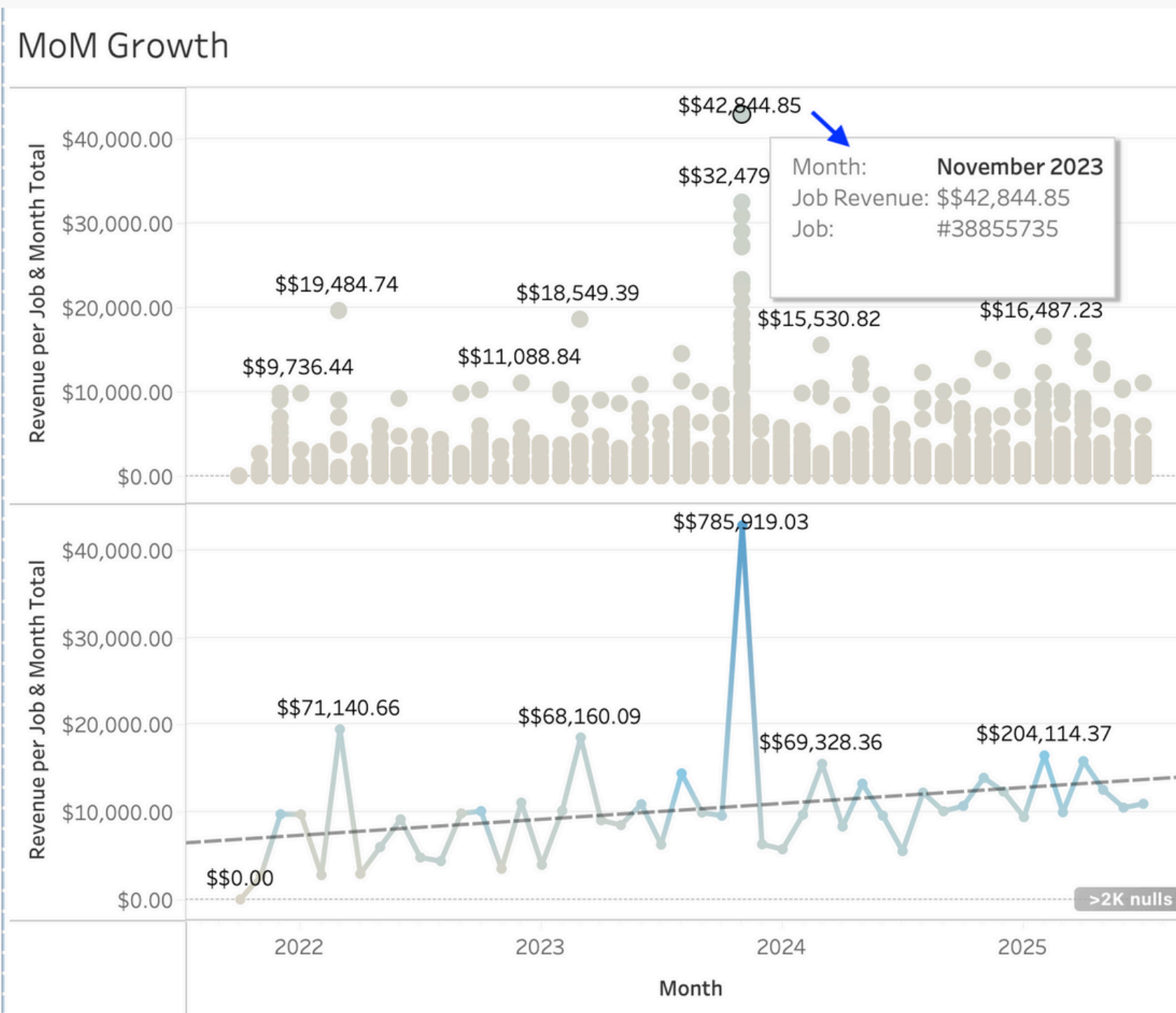
Implement a first-purchase incentives to convert a higher percentage of new sign-ups into paying customers, further accelerating revenue growth.

Q - IS THE BUSINESS SHOWING POSITIVE REVENUE GROWTH OVER TIME?

Purpose: Ensure the business is on track to meet long-term goals and profitability targets.



Recommendation



The above chart displays the exact number of jobs contributing to revenue. By overlaying a line on the month-over-month revenue chart, we can observe a slight upward trend.

Continue monitoring monthly job volumes and revenue trends. To accelerate growth, focus on increasing high-value job bookings through targeted marketing, seasonal promotions, and upselling complementary services to existing customers.

ElectricZ

2021 - 2025

Total List in Database: 6,406

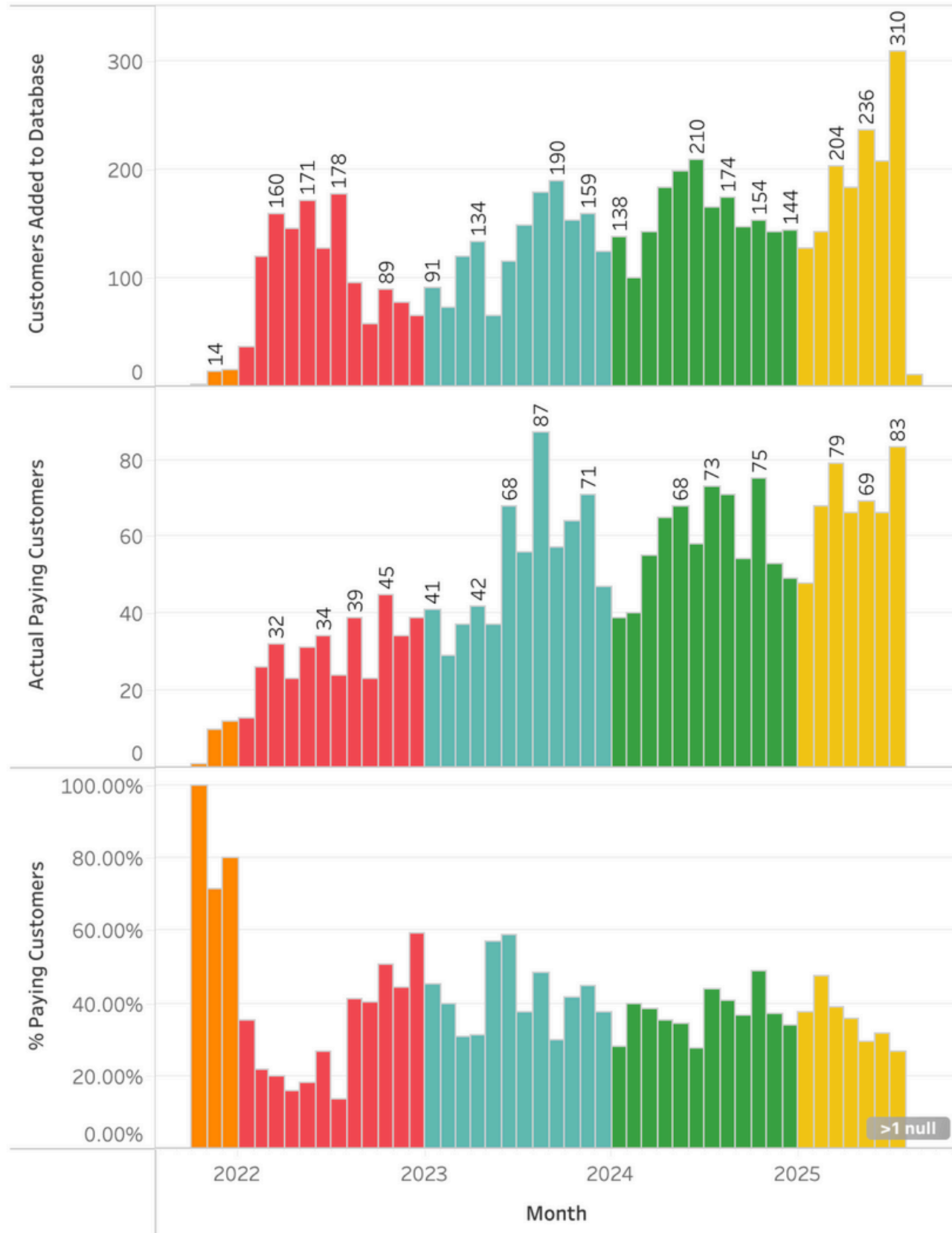
Paying Customers: 2,275

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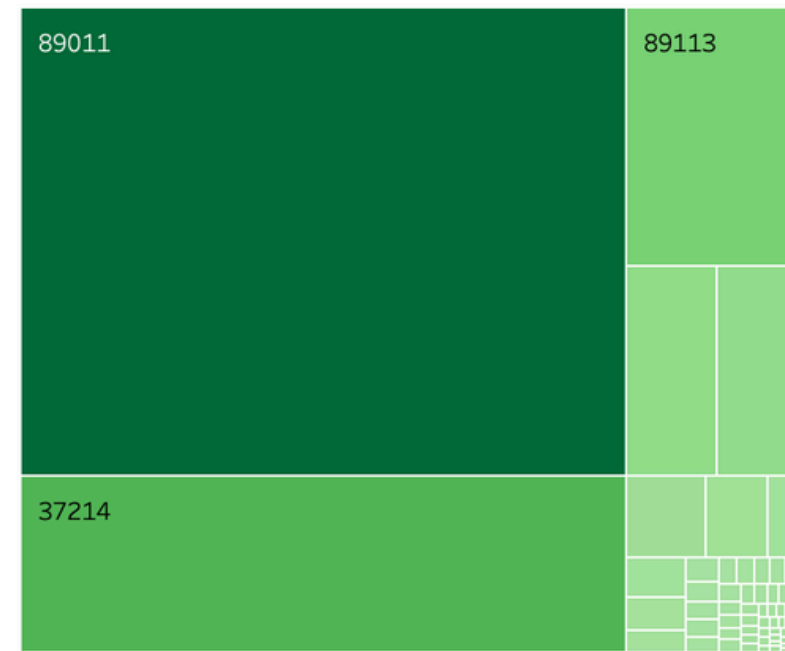
Paying customers make up 35.5% of the customer base.

Year of Cre.. ■ Null ■ 2021 ■ 2022 ■ 2023 ■ 2024 ■ 2025

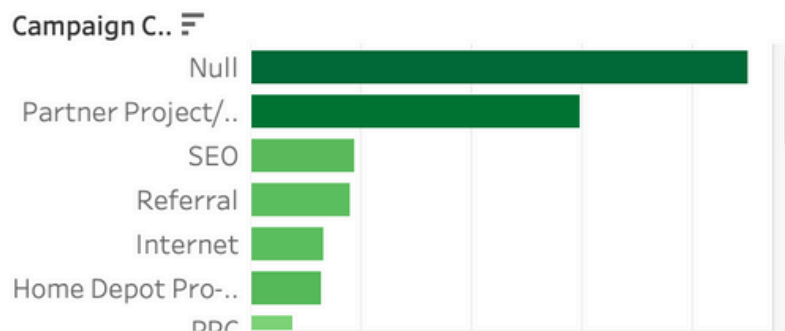
MoM Customer Growth



Zip Codes & Revenue



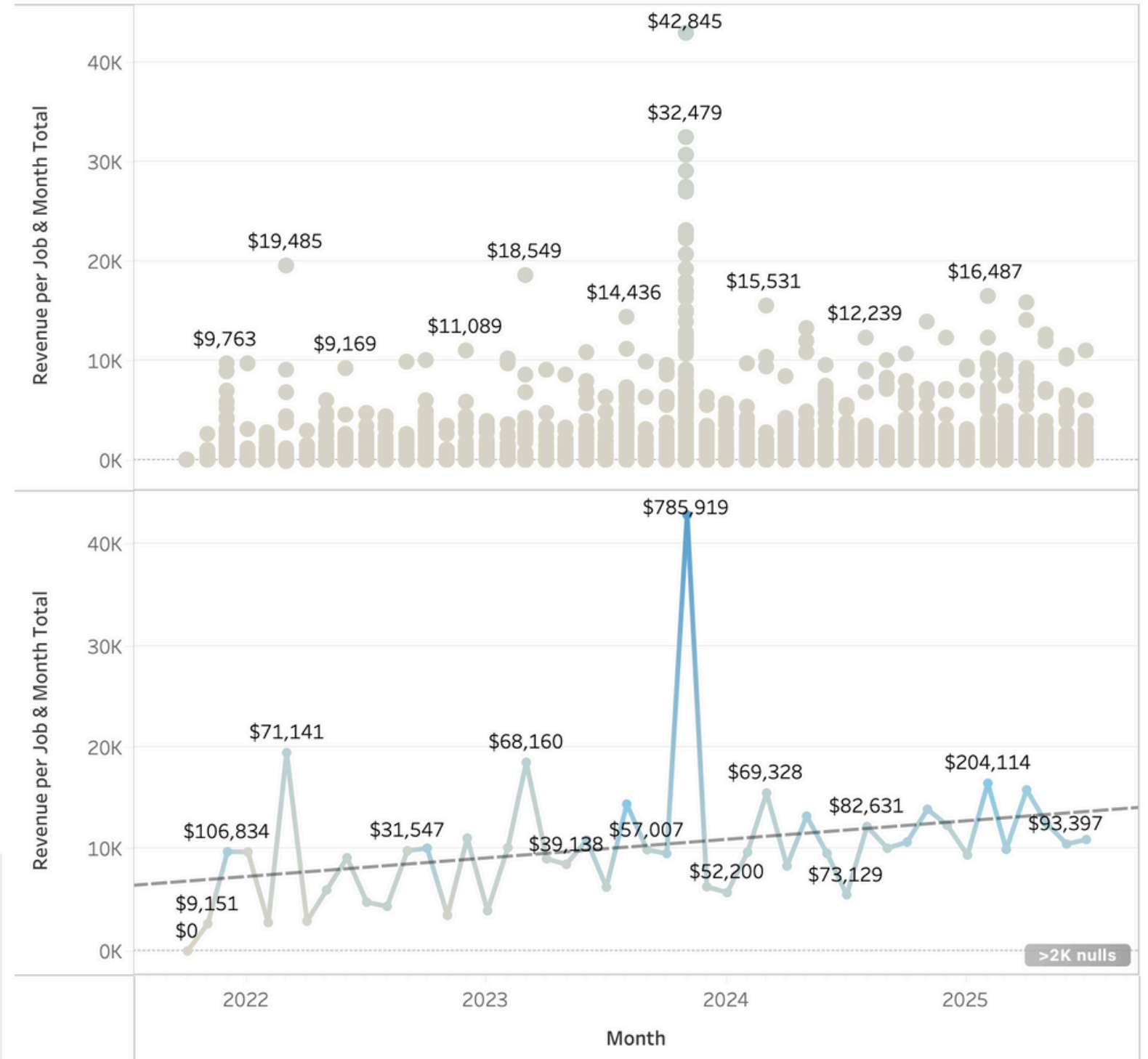
Jobs Received From Campaign



Customer / Job Count / Revenue

Customer Name	Jobs	Revenue
Pacific Bath Company	692	\$630,974.08
Safe Step	429	\$387,123.88
Rebath of Las Vegas	185	\$140,907.60
Planet 13	145	\$190,635.19
Reborn Cabinets	114	\$89,941.11
STLV	98	\$708,012.47
Standard Management Co..	82	\$93,300.11
Lowe's Pros - Handy.com	79	\$11,966.87
Thompson Family Brand LLC	66	\$58,433.97

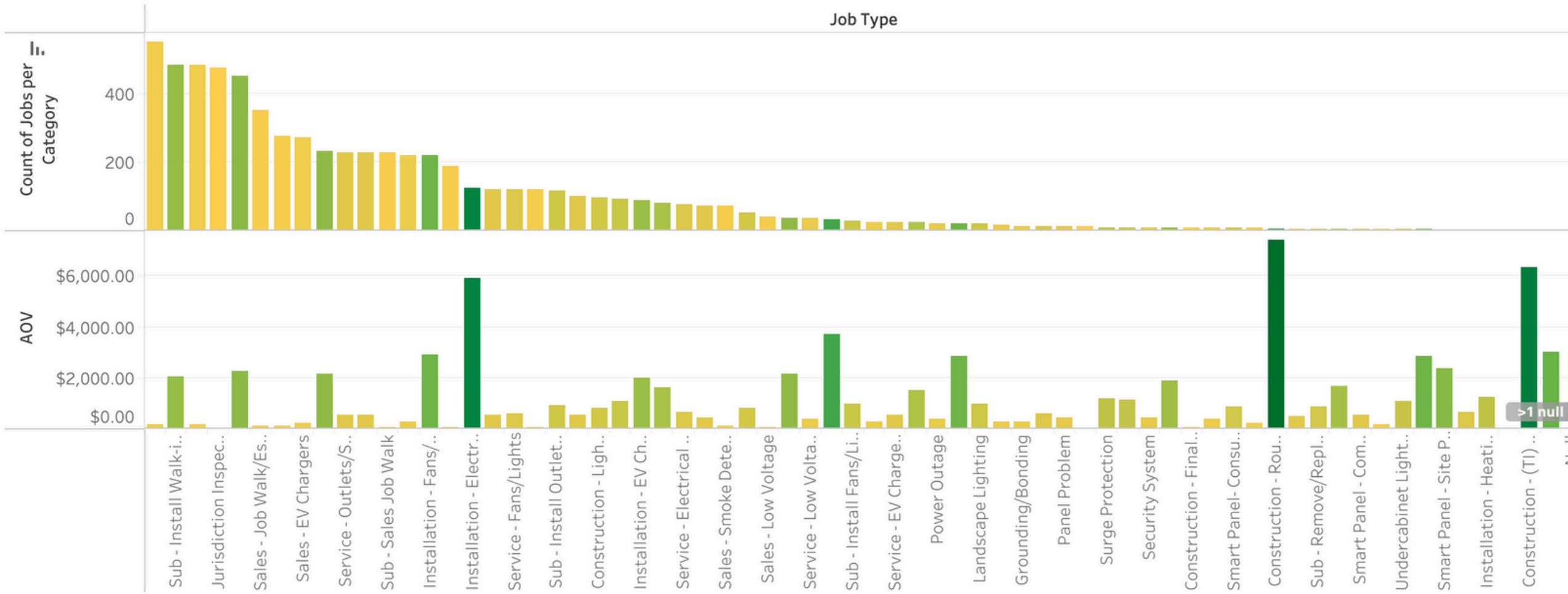
MoM Growth



Job Type & Revenue

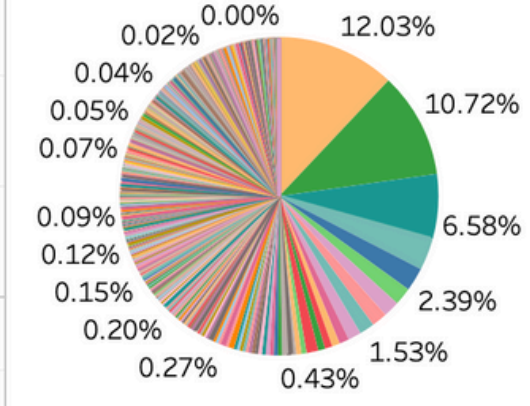
Job Type	Revenue	Job Count	AOV
Sub - Install Walk-in Bath Electrical	\$1,006,320.84	487	\$2,066.37
Jurisdiction Inspection	\$7,372.35	477	\$15.46
Sub - Sales Job Walk	\$13,561.45	227	\$59.74
Sales - Job Walk/Estimate	\$29,202.86	349	\$83.68
Imported JobType	\$399,854.29	187	\$2,138.26
Sub - Install Outlets/Switches	\$108,122.55	116	\$932.09
Installation - Outlets/Switches	\$1,030,118.59	451	\$2,284.08
Installation - Fans/Lights	\$626,578.45	217	\$2,887.46
Outlets/Switches	\$127,483.95	228	\$559.14

Job Count and AOV



Customer & Revenue

Pie



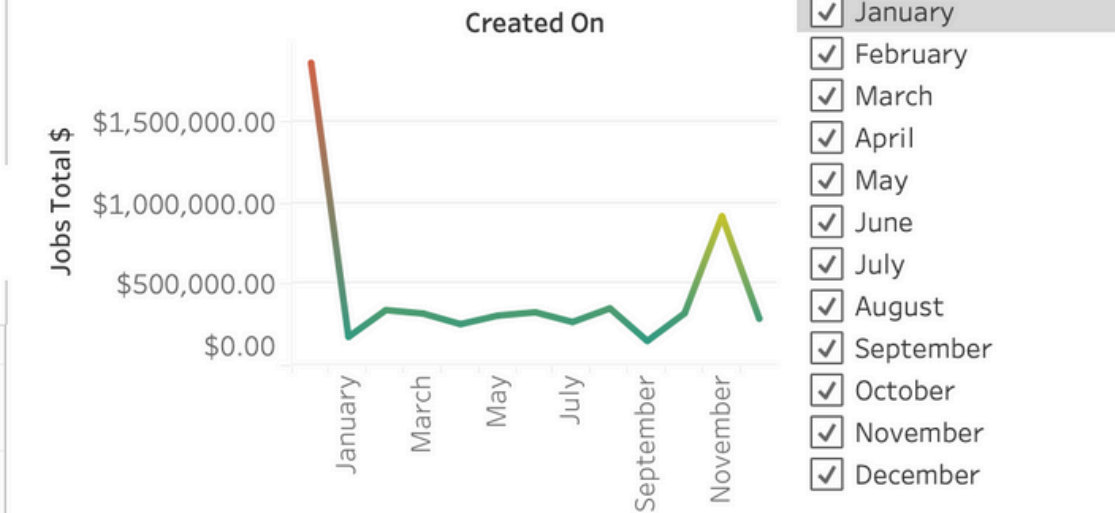
Customer Name

- STLV
- Pacific Bath Com..
- Safe Step
- Planet 13
- Rebath of Las Ve..
- Craters & Freigh..
- Addison, Inc.
- Standard Manag..
- Reborn Cabinets
- Anthem 11
- Thompson Famil..
- Square Customer
- Greg & Christin B..
- Randy Payette- ..
- Reen Singh
- First Christian C

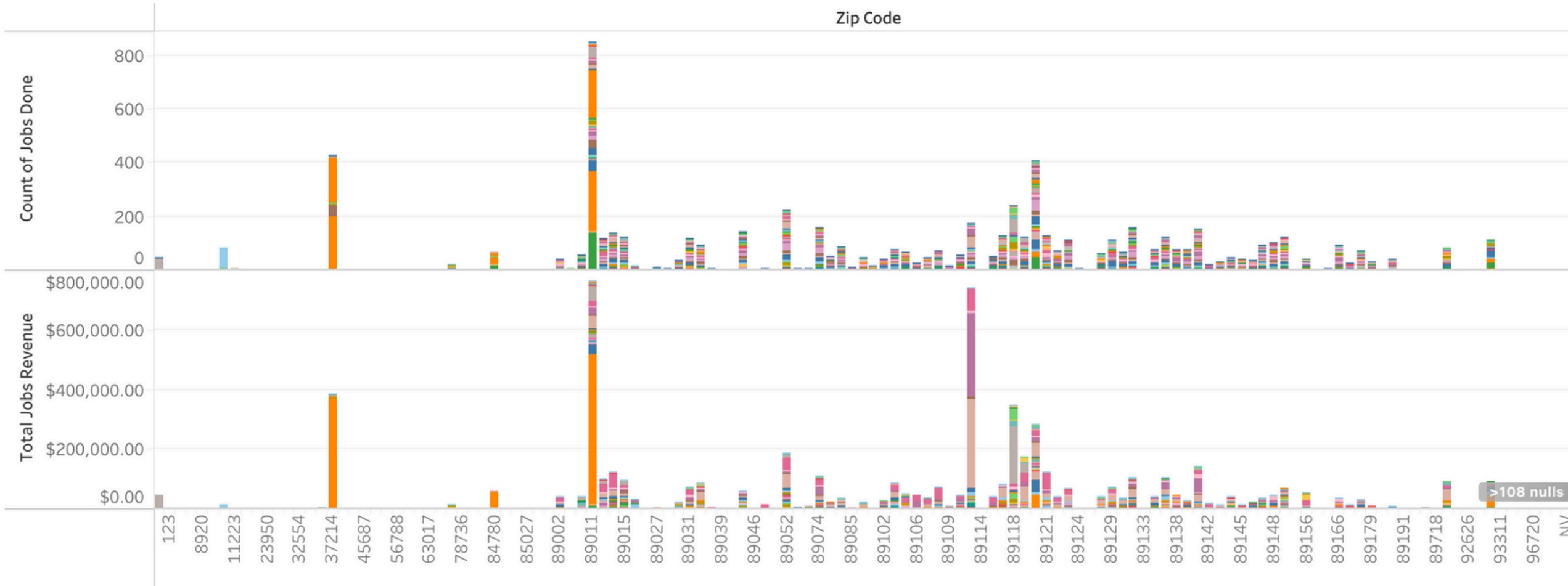
Month of Created On

- (All)
- Null
- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

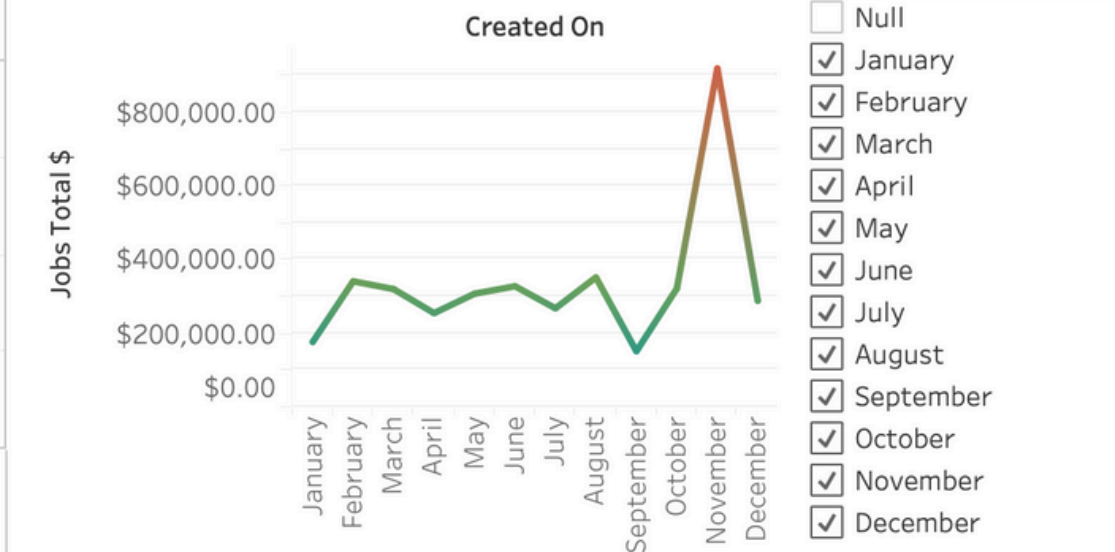
Seasonality Trend (1)



Zip Code & Job Count



Seasonality Trend (2)



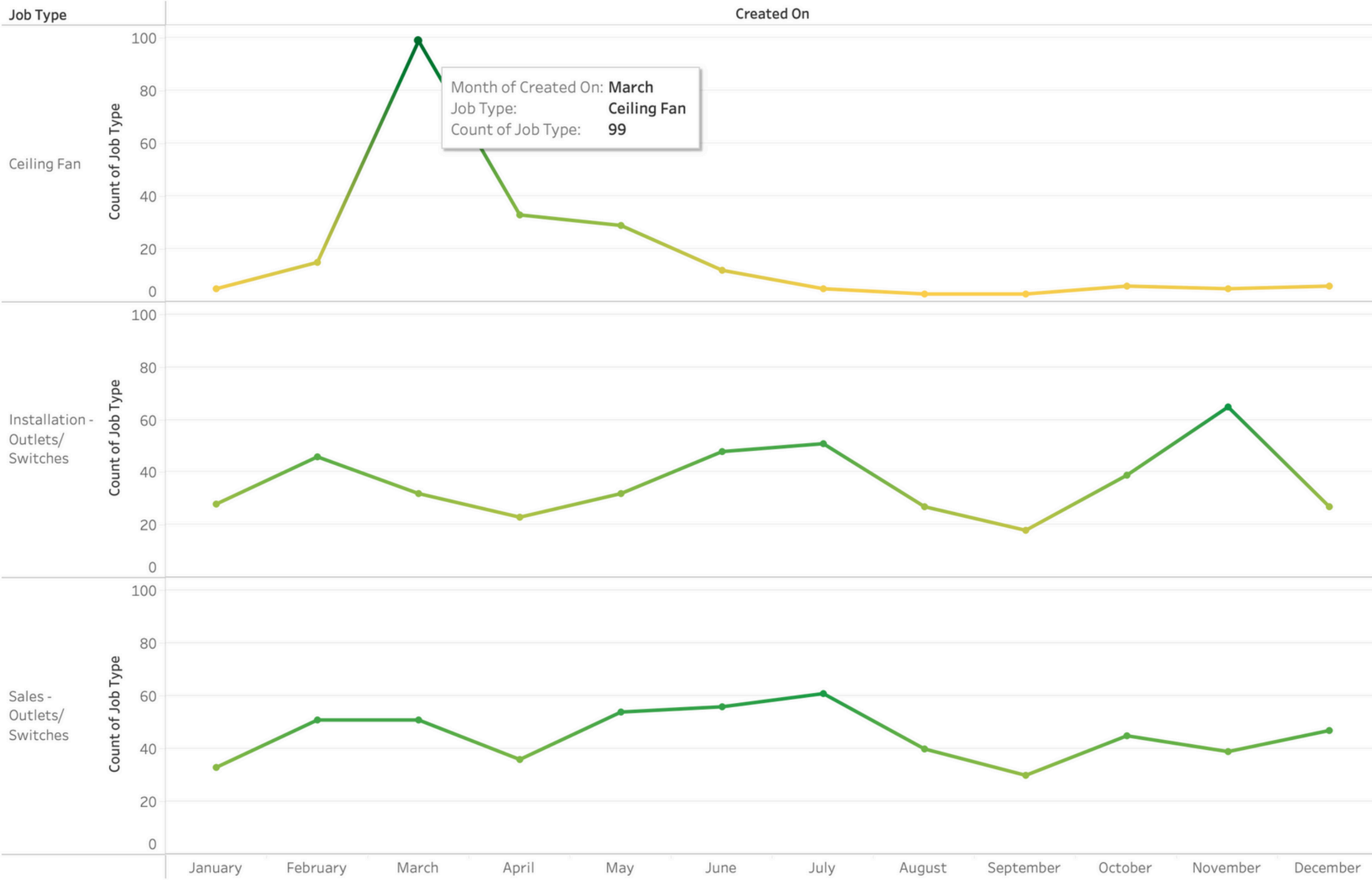
Month of Created On

- (All)
- Null
- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

Job Category MoM (Text)

Job Type	Total Jobs Done
Sales - Outlets/Switches	543
Sales - Fans/Lights	474
Installation - Outlets/Swit..	436
Sales - Critical Home Safet..	275
Sales - EV Chargers	273
Sales - Job Walk/Estimate	233
Ceiling Fan	221
Service - Outlets/Switches	217
Installation - Fans/Lights	214
Sales - Electrical Panel	187
Outlets/Switches	147
Installation - Electrical Pa..	121
Jurisdiction Inspection	121
Maintenance - Electrical A..	117
Service - Fans/Lights	117
Installation - EV Charger	87
Installation - Smoke Detec..	82
Miscellaneous	80
Service - Electrical Panel	77
Sales - Smoke Detectors	72
Service - Power Outage	72
Equipment Power	62
Rewire/Wiring Issue	62
Construction - Lighting Ret..	53
EV Charger	52
Sales - Low Voltage	41
Installation - Whole Home ..	32
Service - Low Voltage	28
Sub - Install Walk-in Bath E..	26
Service - Smoke Detectors	25
Installation - Low Voltage	24
Service - EV Chargers	24
Sub - Sales Job Walk	20
Landscape Lighting	19
Panel Upgrade	19
Sub - Install Partial Home ..	17
Power Outage	15

Job Category MoM (Line)



- Job Type**
- Outlets/Switches
 - Panel Problem
 - Panel Refresh
 - Panel Upgrade
 - Pendant Lighting
 - Power Outage
 - Recessed/Can Ligh...
 - Rewire/Wiring Issue
 - Sales - Critical Ho...
 - Sales - Electrical P...
 - Sales - EV Chargers
 - Sales - Fans/Lights
 - Sales - Job Walk/E...
 - Sales - Low Voltage
 - Sales - Outlets/Sw...
 - Sales - Smoke Det...
 - Sales - Whole Hom...
 - Security System
 - Service - Electrical ...
 - Service - EV Charg...
 - Service - Fans/Ligh...
 - Service - Low Volta...
 - Service - Outlets/S...
 - Service - Panel Per...
 - Service - Power Ou...
 - Service - Smoke De...
 - Service - Whole Ho...
 - Service Call
 - Smart Panel - Com...
 - Smart Panel - Instal...
 - Smart Panel - Site ...
 - Smart Panel- Cons...
 - Smoke Detectors
 - Sub - Install Fans/L...
 - Sub - Install Outlet...
 - Sub - Install Partia...
 - Sub - Install Walk-i...
 - Sub - Remove/Repl...
 - Sub - Sales Job Walk
 - Surge Protection



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