ELEVARE SOLUTIONS

Sample Business Performance Report

Cedarline Property Services

This fictional example uses invented figures and does not represent a client or an Elevare outcome.

Financial analysis

Metric	Prior quarter	Current quarter
Revenue	$300,000	$315,000
Direct costs	$195,000	$214,200
Gross profit	$105,000	$100,800
Gross margin	35.0%	32.0%

Revenue rose 5%, while gross profit fell 4% and gross margin fell 3 percentage points. Job-level labor and material costs are the first areas to investigate. The quarterly totals alone do not establish the cause.

Operational findings

- 12 of 40 sampled estimates had no logged follow-up within two business days.
- 8 of 30 sampled completed jobs lacked a same-week labor allocation, limiting job margin reporting.

Recommended first 30 days

1. **Sales lead, week 1:** Assign open estimates an owner and follow-up date. Track the share followed up within two business days. The sample baseline is 70%.

2. **Operations lead, weeks 1–2:** Review labor entries weekly. Track the share of completed jobs with labor allocated in the same week. The sample baseline is approximately 73%.

3. **Leadership, week 4:** Review job margin by service line and decide which pricing, labor, or materials questions need deeper analysis.