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FREE WORKSHEET

Answering service break-even worksheet

Price, minutes, customers needed and the cheaper fixes, side by side on one page.

1. What you miss now

Missed enquiries a month: _____ × close rate _____ % × customer value $_____ = $_____ a month

2. The plan

Service and plan	_____
Monthly price ($)	_____
Minutes or calls included	_____
Price for extra minutes or calls	_____
Setup fee, contract length, notice period	_____

3. Break-even

Profit from one new customer (value × your margin): $_____

Customers needed a month = monthly price ÷ profit per customer = _____

Customers you would win = calls sent to the service _____ × share that are real enquiries _____ % × close rate _____ % = _____

Worth trialling if the second number is clearly bigger than the first. ☐ Yes ☐ No

4. Minutes check

Calls a month sent to the service _____ × average minutes per call _____ = _____ minutes. Plan includes _____. Over or under?

5. Cheaper fixes first

Fix	Monthly cost	Misses it would catch	Try first?
Callback rule (every voicemail returned within the hour)	$0		
Voicemail greeting with a booking link	$0		

Fix	Monthly cost	Misses it would catch	Try first?
Booking page on website and Google profile			
Calls forwarded to a colleague at busy times			

6. Trial review after two months

Missed enquiries before _____ after _____ New customers from answered calls _____ Keep?

☐ Yes ☐ No