THE JOB PROFITABILITY REVIEW

A simple post-job review for contractors and service businesses who want to identify accurate job costs.

When a job closes, the revenue is visible. What's harder to see is whether the margin held — and if it didn't, where it went. This review helps you look back at a completed job with enough specificity to understand what it produced, so the next similar job can be priced and managed accordingly.

Use this after every significant job. The answers are most useful when they're captured close to completion, before memory smooths over the details.

Job Information

Job or Client Name: ______________________________

Job Type: ______________________________

Completion Date: ______________________________

Contract Value: ______________________________

Estimated Margin: ______________________________

Actual Margin (after review): ______________________________

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1. Labor — Did It Match the Estimate?

- ▢ Were all installer and technician labor recorded and assigned to this job?
- ▢ Did any crew hours get absorbed into overhead rather than tracked to this job?
- ▢ Did the job require more hours than originally scoped — and if so, were those hours recorded?
- ▢ Were subcontractor costs tied to this job specifically, not to a general expense category?
- ▢ What was the actual labor cost per hour delivered on this job?

Notes:

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2. Materials and Job-Specific Costs — Were They Captured?

- ▢ Were all materials costs assigned to this job — not to general supplies or overhead?
- ▢ Were freight, delivery, and handling costs recorded against this job?
- ▢ Were any materials purchased for this job used on another job without adjustment?
- ▢ Were tools or supplies specific to this job tracked separately?
- ▢ Were permits, fees, or inspections associated with this job recorded to it?

Notes:

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3. Operational Costs — Did They Show Up?

- ▢ Were fuel, tolls, and vehicle costs for this job tracked as job costs — not general overhead?
- ▢ Were any repairs or equipment costs specific to this job captured?
- ▢ Were subcontractor invoices received and recorded before the job was considered closed?
- ▢ Were any costs for this job still outstanding or unposted at completion?

Notes:

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4. Scope Changes — Were They Tracked?

- ▢ Did the scope of this job change after the original estimate?
- ▢ Were any change orders documented and recorded against this job?
- ▢ Were additional hours or materials absorbed without adjustment to the contract or cost tracking?
- ▢ If the job ran long or required extra visits, was that captured somewhere in the books?

Notes:

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5. Margin — Did It Hold?

- ▢ What was the estimated margin on this job at the time of the bid?
- ▢ What was the actual margin once all costs were recorded?
- ▢ If there was a variance, what drove it — labor, materials, scope, or something else?
- ▢ Was the margin consistent with similar jobs from the prior season?
- ▢ If the margin was thinner than expected, is the pricing on similar jobs still accurate?

Notes:

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6. What This Job Is Telling You

Use this section to capture the one or two things this job revealed that should inform how you price, scope, or manage the next similar job.

What this job showed us:

What we'll do differently next time:

If the numbers from this review surprised you — or if you don't have the information to answer these questions — that's worth a closer look at how job costs are being recorded in your books.

A Clarity Call is a calm, no-pressure place to start that conversation.
Schedule one at calendly.com/jim-primeentrybookkeeping