

Performance & Opportunity Scan

North Ridge Mechanical Ltd.

A focused look at what the business should fix, improve, and build next, followed by a practical path forward.

Each Scan is tailored to the business; the metrics, focus areas, and recommendations vary by operating model and priorities.

BUSINESS AT A GLANCE

Business	HVAC service and light commercial installations
Location	Alberta
Team	21 employees: 6 office/management, 15 field
Revenue	\$4.8M trailing 12 months
Current stage	Growing demand; operating systems have not fully caught up

EXECUTIVE SUMMARY

North Ridge has strong demand, capable people, and a healthy base business. The main constraint is the path from quote -> to field execution -> to job closeout.

Several small gaps are creating owner bottlenecks, slower quotes, missed change-order value, and delayed visibility into job performance. The highest-value next step is a focused operating reset.

WHERE I WOULD FOCUS FIRST

Quote and change-order workflow

Create one clear path from request to approval, field execution, and billing.

Weekly operating scoreboard

Give leadership earlier visibility into quotes, margins, closeout, and capacity.

Job closeout ownership

Clarify who closes the loop and when performance is reviewed.

Start with context.

The business is performing, but operating gaps are holding it back. The focus is to identify the highest-value issues and what can realistically improve over the next 90 days.

WHAT I HEARD

- Demand is steady and the company is winning enough work to grow.
- The owner still reviews or approves most meaningful quotes.
- Field changes are not always documented before the work is completed.
- Job-cost information arrives too late to correct slipping work early.
- The office uses several disconnected spreadsheets and software tools.
- Leadership meetings review activity, but not a consistent operating scoreboard.

CURRENT OPERATING PICTURE

What is working: customer demand, technical capability, reputation, and willingness to improve.

What is creating drag: owner approvals, inconsistent handoffs, delayed closeout, and weak visibility.

What the business needs next: a simpler operating rhythm with clear triggers, owners, and measures.

Initial view based on two leadership conversations, one project-manager interview, and a review of sample quotes, job-cost reports, and change-order records.

THE SCOREBOARD

MEASURE	CURRENT VIEW	NEAR-TERM TARGET	ASSESSMENT	WHY IT MATTERS
Quote turnaround	3.8 business days	< 2.0 days	NEEDS ATTENTION	Speed affects win rate and customer experience.
Estimate win rate	42% overall	Track by job type	ON TRACK	The blended number hides where estimating is strongest.
Gross margin	31%	35%	WATCH	Small execution leaks compound across the year.
Change orders captured	Estimated 70%	> 95%	NOT RELIABLY MEASURED	Completed work is not always translated into revenue.
Jobs closed within 10 days	45%	> 90%	NEEDS ATTENTION	Delayed closeout delays learning, billing, and margin visibility.
Owner time in quoting	12+ hours/week	< 6 hours/week	NEEDS ATTENTION	Leadership time is being consumed by routine approvals.

WHAT IS GETTING IN THE WAY

Approval bottleneck

Too many quotes wait for the owner, even when the risk is low.

Handoff gaps

Scope, assumptions, and changes are not consistently carried from office to field.

Late visibility

Job performance becomes clear after the opportunity to correct it has passed.

Tool fragmentation

Information is re-entered or reconciled across several systems and spreadsheets.

Opportunity map.

Different starting points. The same objective: a stronger business. The items below are separated into what should be fixed now, what can be improved, and what may be worth building next.

FIX

Get back to good.

Capture field changes every time

Create one trigger, one owner, and one record before additional work proceeds.

Close jobs on a defined rhythm

Use a short checklist for cost review, billing, lessons, and documentation.

Set quote-approval thresholds

Reserve owner review for higher-risk or lower-margin opportunities.

IMPROVE

Raise the standard.

Run a weekly scoreboard

Review a small set of forward-looking and result measures with named owners.

Segment estimating performance

Compare win rate and margin by customer, job type, and estimator.

Improve field-office handoffs

Standardize the scope, assumptions, labour plan, and change process at kickoff.

BUILD

Build what's next.

Lightweight quote intake

Create a mobile-friendly way to collect the minimum information needed for a fast quote.

AI-assisted first drafts

Use approved company context to draft scopes and assumptions for human review.

30-day execution rhythm

Give improvement work an owner, milestones, weekly decisions, and visible results.

PRIORITY ASSESSMENT

#	OPPORTUNITY	IMPACT	EFFORT	EVIDENCE	RECOMMENDED ORDER
1	Change-order capture	High	Low	High	Start immediately
2	Weekly operating scoreboard	High	Low	High	Build in week one
3	Quote turnaround and thresholds	High	Medium	High	Pilot in first 30 days
4	Job closeout rhythm	Medium	Low	High	Launch with scoreboard
5	AI-assisted scope drafting	Medium	Medium	Medium	Test after process is clear

Evidence reflects the strength of information available during the Scan.

Where I would focus now

1. Standardize quote, field-change, and closeout triggers before buying or building new software.
2. Put six operating measures in front of leadership every week with a named owner for each.
3. Pilot the new workflow on one team for 30 days, measure the result, and adjust before expanding.

Turn priorities into action.

Start with the smallest useful piece of work, create a visible result, and build from what works.

30 First 30 days

- Confirm six scoreboard measures, definitions, owners, and baseline values.
- Map the quote-to-closeout workflow and define approval thresholds.
- Launch a simple field-change trigger and closeout checklist.
- Pilot the operating rhythm with one team.

60 By day 60

- Review pilot results and remove steps that do not add value.
- Automate or simplify the first version of the weekly scoreboard.
- Train office and field leads on the revised handoffs.
- Segment quote and margin performance by work type.

90 By day 90

- Expand the proven workflow across the business.
- Confirm the financial and time impact against baseline.
- Decide whether a new quoting tool or AI pilot is justified.
- Set the next improvement priority.

What North Ridge can own internally

- Name an owner for the improvement sprint.
- Require field changes to be recorded before work continues.
- Hold a 25-minute weekly scoreboard review.
- Provide access to quotes, job costs, and closeout data.

Where Opvida could help

- Map and redesign the quote-to-closeout workflow.
- Build the operating scoreboard and reporting cadence.
- Lead the 30-day pilot and keep owners, decisions, and actions moving.
- Measure results and recommend the next practical step.

RECOMMENDED FIRST ENGAGEMENT

30-Day Focused Improvement Project

A defined sprint around the quote, change-order, and close out workflow, supported by a simple weekly scoreboard.

Scope: workflow design, KPI definitions, pilot tools, weekly coordination, and a final results review.

WHAT SUCCESS LOOKS LIKE

- Quote turnaround reduced toward two days.
- Change-order capture above 95% in the pilot.
- 90% of pilot jobs closed within 10 days.
- Owner quoting time materially reduced.

DECISION POINT - 30 DAYS

At the end of 30 days, North Ridge can keep the process internally, expand the pilot with Opvida, or stop. The first engagement should create value on its own.