

TOOL		THE JOB IT WAS HIRED TO DO (ONE SENTENCE)		OWNER
FULL MONTHLY COST	GROSS PROFIT PER JOB	BREAK EVEN: EXTRA SIGNED JOBS	Break even = full monthly cost (subscription + setup + your team's hours) ÷ gross profit per job. That is the floor : the smallest gain that pays for the tool. Set the target from your own best weeks of the last 3 to 6 months.	
GO LIVE DATE	CHECK DATE (AFTER THE LEARNING CURVE, BEFORE RENEWAL)		LEADS OR JOBS IT TOUCHES	

NUMBER THE TOOL MUST MOVE	TYPE	SOURCE SYSTEM	BASELINE (LAST 3 MONTHS)	FLOOR (BREAK EVEN)	TARGET (YOUR BEST WEEKS)	MONTH 1	MONTH 2	MONTH 3
	LEADING / LAGGING							
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☐ KEEP The lagging number cleared the floor and is heading for the target. Set the next review date.	☐ FIX The leading number moved but the lagging one did not, or it moved but sits below the floor. Fix the handoff, set one more check date.	☐ CUT Neither number moved by the check date. Cancel before renewal and write down why.
WHY (ONE SENTENCE)		

FILL IT IN, IN THIS ORDER

- Write the job in one sentence and name one owner.
- Add up the full monthly cost: subscription, setup, your team's hours.
- Pick one or two leading and lagging numbers from your CRM and books.
- Pull 3 months of baseline for the leads or jobs the tool touches.
- Set the floor (break even) and the target (your best weeks).
- Set the check date: after the learning curve, before renewal.
- Review monthly. On the check date, tick keep, fix or cut.