



The Repair & Maintenance Proposal Review Playbook

How facilities teams can spot proposal risk, control costs, and make faster repair and maintenance decisions.

Repair and maintenance proposals are where better decisions begin

For multi-site facilities teams, every HVAC, electrical, plumbing, refrigeration, and general repair or maintenance proposal comes with a list of decisions:

Approve? Ask for more detail? Challenge the cost?
Adjust the scope? Repair or replace instead?

When parts, labor, scope, or documentation are unclear, those decisions aren't easy to make.

That's where ServiceChannel Trade Specialists come in. They review proposals with real-world trade expertise so facilities teams can validate the work, control costs, and move forward with confidence. **Even if you don't have a Trade Specialist in your corner, you can still learn to think like one so that every proposal stays within budget and sets everyone up for success.**

In this playbook, we break down:

- Where proposal risk tends to hide
- What to check before approving work
- How clearer proposals help facilities teams and providers
- How Trade Specialists bring real-world expertise to every review

Red flags and green flags: What to look for in proposals

Better proposal review starts with knowing where to look.
Keep a close eye on these four components of every proposal:

Parts:

- ▶ Inflated markups, bundled materials, unclear pricing
- ▶ **Itemized materials, clear part descriptions, pricing that aligns with the work**

Scope:

- ▶ Unnecessary work, unsupported replacements, duplicate line items
- ▶ **Scope tied to the original issue, explained add-ons, repair-or-replace recommendation backed by evidence**

Labor:

- ▶ Too many hours, too many technicians, flat-rate charges
- ▶ **Clear labor breakdown, justified crew size, hours that match the scope**

Documentation:

- ▶ Missing photos, vague notes, incomplete asset details
- ▶ **Photos included, clear diagnosis, asset details listed, work plan easy to understand**

“A provider might submit a proposal for a PM project and assume that one or more parts will need to be replaced. That’s fine if the service tech finds legitimate things that need replacing, but we want to be sure that they are only replacing parts that require it.”

Rick Verow

ServiceChannel Trade Specialist

Review proposals like a trade specialist

Once you know where proposal risk can show up, the next step is deciding what to do with it. Use these questions to determine whether a proposal is ready to approve, needs more context, or should be challenged.

1.

Does the proposal match the problem?

The proposed work should connect clearly to the original service request, asset condition, and technician findings.

- What issue is this solving?
- Does the proposed scope match the diagnosis?
- Are any add-ons clearly explained?

2.

Is the cost supported?

Pricing should be easy to understand and tied to the work being performed.

- Are parts and labor separated?
- Are high-cost items explained?
- Do the hours and crew size make sense for the job?

3.

Is the recommendation backed by evidence?

Repair-or-replace decisions should be supported by asset details, photos, troubleshooting notes, or service history.

- Is there enough documentation to approve the work?
- Is replacement clearly justified?
- Would more information change the decision?

“The more detail you provide about what you plan to do on-site, the faster and easier it is for everyone to approve and complete the work.”

Michael Stone

ServiceChannel Trade Specialist

What to focus on during busy seasons



Heavy usage can expose weak spots across assets, preventative maintenance (PM) programs, provider performance, and budgets.

During these periods,
review for:

- Repeat proposals on the same asset
- Similar issues across multiple locations
- Emergency repairs that PM could have prevented
- Providers that need frequent follow-up
- Replacement recommendations that keep resurfacing
- Trades driving unexpected spend

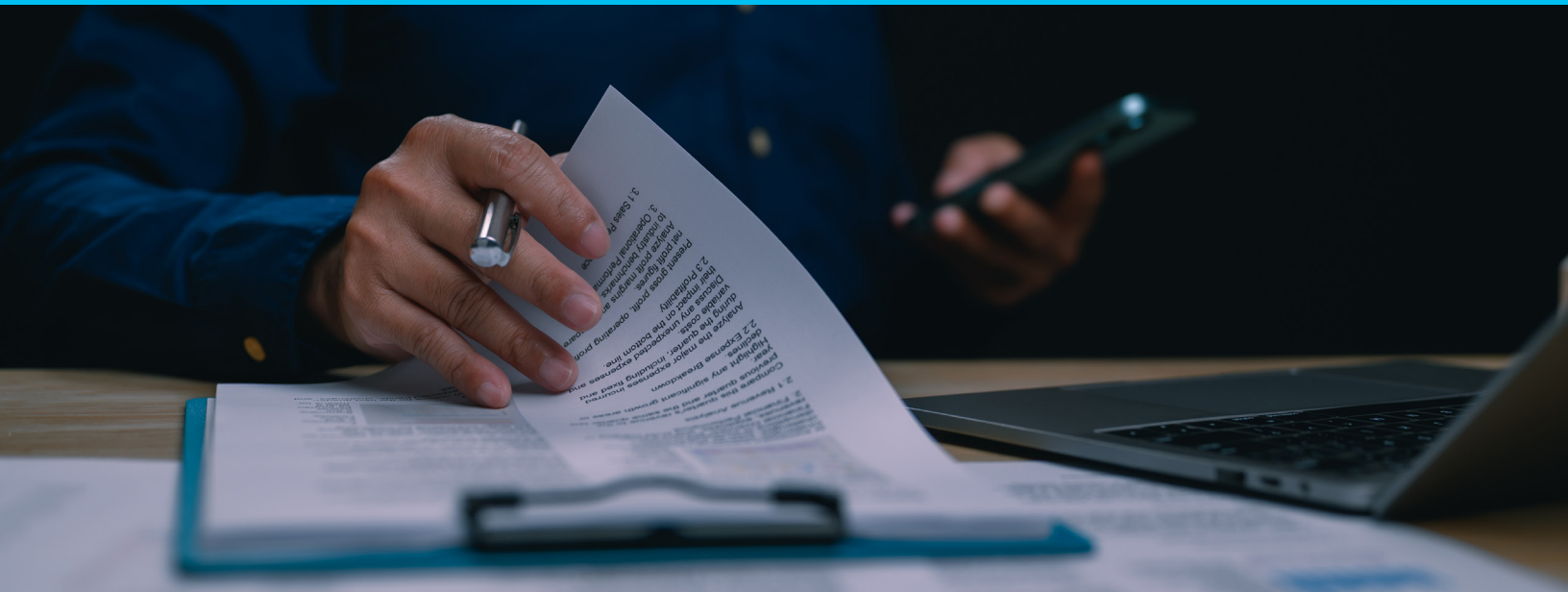
“If we see too many reactive repairs in the data, that tells us something’s off in the PM plan.”

Millard Wilson

ServiceChannel Senior Trade Specialist

Use proposal patterns to adjust PM plans, prioritize replacements, improve provider expectations, and plan budgets with more confidence.

Trade Specialists pressure-test every assumption



Trade Specialists are experienced facilities professionals with real-world expertise across trades like HVAC, electrical, plumbing, refrigeration, and general construction. They understand what high-quality repair work requires, and they draw upon that experience to determine whether the price, scope, and recommended work actually make sense.

ServiceChannel Trade Specialists review proposals line by line to validate:

- Technical accuracy
- Competitive pricing
- Labor assumptions
- Material costs
- Repair vs. replacement decisions
- Scope clarity
- Documentation quality

“We’re here to make sure the work is right, the pricing’s fair, and the client can move forward with confidence.”

Allen Carpenter

ServiceChannel Trade Specialist

Smarter proposal reviews generate real results

In 2025, ServiceChannel Trade Specialists generated more than **\$2.3 million** in potential direct and indirect savings for ServiceChannel Managed clients. That included:



\$1.7M

Direct savings from proposals negotiated down or rescope

\$560K

Indirect savings from time spent on proposal reviews

26%

Reduction from original proposal costs through direct savings






“Our job is to save clients money and give them their time back. We do both every day.”

Michael Stone






ServiceChannel Trade Specialist

The mutual benefits of high-quality proposals for FM teams and providers






Facilities teams gain:

-  Faster approvals
-  More confidence
-  Better cost control
-  Fewer surprises
-  Less back-and-forth

Providers gain:

-  Clearer expectations
-  Fewer rejected proposals
-  Faster movement through approvals
-  Stronger client trust
-  Better chances to win future work

Learn more about trade specialists and proposal reviews on the ServiceChannel blog:

-  [**The Price Isn't Right:**](#) Learn how to spot red flags in repair and maintenance proposals.
-  [**Winning More Business and Avoiding Missteps:**](#) See how providers can submit clearer, stronger proposals.
-  [**Seasonal Wear and Repair:**](#) Learn how peak-period strain can reveal smarter maintenance opportunities.
-  [**Behind the Numbers:**](#) See how Trade Specialists deliver measurable savings for facilities teams.
-  [**Better Together:**](#) Learn how Trade Specialists bring hands-on expertise to proposal reviews.

Learn more about ServiceChannel and how Trade Specialists help facilities teams review proposals with confidence and control costs.

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