

01 Where you are

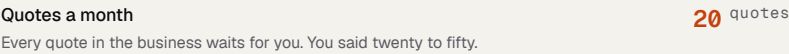
64 percent of residential contractors still run the business on the phone (ServiceTitan, Residential Services Report 2025), which is why every line above is about who picks it up.



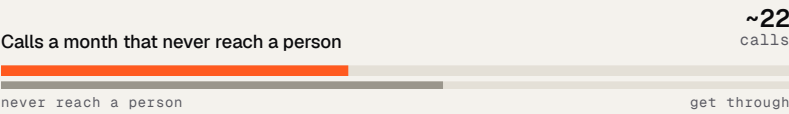
You said fifty to two hundred. Everything below counts at least fifty calls a month.



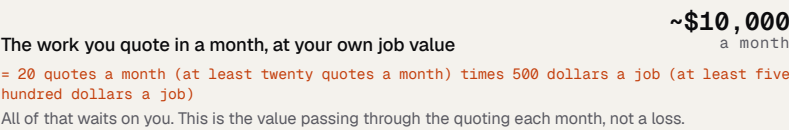
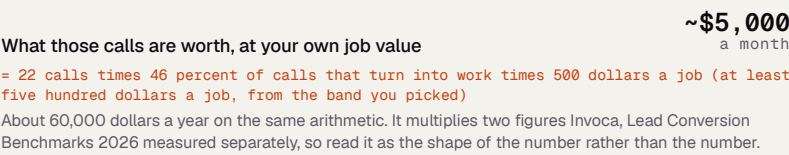
55 percent of customers expect an answer inside the hour and 11 percent of HVAC companies manage it. The gap is the finding, not either number on its own.



02 What it is costing you



= 50 calls a month (at least fifty calls a month, from the band you picked) times 44 percent Invoca, Lead Conversion Benchmarks 2026 measured that 44 percent of callers never reach a person, counting hold, voicemail and phone menus together. A caller who reaches voicemail rings the next company on the list.

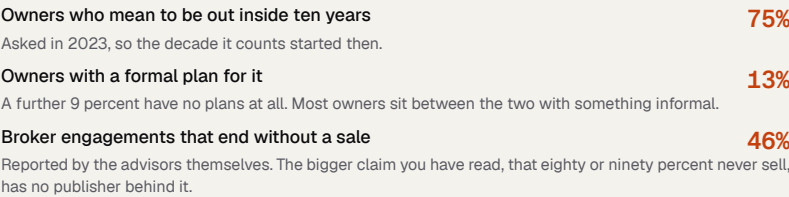


InsideSales / XANT, Lead Response Management 2021 found 77 percent of leads are never responded to at all, across 5.7 million of them. Those were business to business leads and not HVAC leads, and it is still the best measured figure anybody publishes on the subject.

03 Where this goes if nothing changes

- 01 Shut it down. The trucks get sold, the techs go to the competitor, and twenty years of customers start calling someone else.
- 02 Put it up for sale as it is. A buyer looks, sees every job runs through you, and either walks or offers a number that insults you.
- 03 Make it run without you first. Then hand it over, sell it for what it is really worth, or keep it and take August off.

The third one is the work, and it is the work we come in and do.



We did not see your books. Every figure marked with a tilde is an estimate built from your own answers, and the line under it says exactly what was multiplied.
You did not tell us how many of your quotes turn into work, so we have not put a figure on the ones that die.

We never tell you what the company is worth, and nothing on this page is a number about that. When there is one, an outside appraiser sets it.

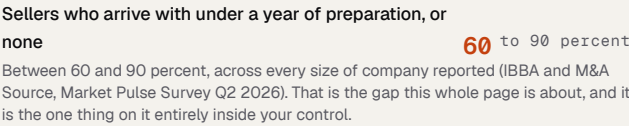
SOURCES 1 Jobber, Home Service Trends Report 2026 · 2 Invoca, Lead Conversion Benchmarks 2026 · 3 Exit Planning Institute, National State of Owner Readiness 2023 · 4 IBBA and M&A Source, Market Pulse Survey Q4 2021 executive report · 5 IBBA and M&A Source, Market Pulse Survey Q2 2026 · 6 ServiceTitan, Residential Services Report 2025 · 7 US Bureau of Labor Statistics, Job Openings and Labor Turnover Survey · 8 Associated Builders and Contractors, 2026 Construction Workforce Shortage Model · 9 InsideSales / XANT, Lead Response Management 2021 · 10 BrightLocal, Local Consumer Review Survey 2026 · 11 CFIB, Succession Tsunami

EXAMPLE ONLY. NOT A CLIENT.

04 The buyer's first question

A buyer's first question about an HVAC company is not how big it is. It is what keeps running without you.

- 01 If you took two weeks off with the phone off, would the jobs still get quoted, sold and done?
- 02 Could you hand a stranger last year's numbers and have them add up without you explaining them?
- 03 How much of next year's work is already booked before the phone rings? Maintenance agreements. Service plans.
- 04 Is there someone who could run a Tuesday without you?
- 05 If a tech quit tomorrow, is how the work gets done written down anywhere but in your head?
- 06 If you stopped answering the phone, where would the work come from?
- 07 Are the licence, the lease and the insurance in the company's name, or yours?
- 08 Who else is buying HVAC companies in your town?



05 What it looks like when it runs without you

You	Who prices the changeouts. Who the customers call. Whose name is on the licence. How many days you took off last year, phone off.		
The systems	Dispatch, quoting, the office software. Flat rate or time and materials. What is written down and what lives in your head.		
The work	Service, changeouts, new installs, light commercial. How much comes back every year on its own: agreements, tune-ups. Whether one builder is a third of your revenue.		
Where the calls come from	What a booked job costs you. Your reviews. How many calls turn into jobs. What happens to a call at 9pm.		

The call	01	02	03
	The audit	The fix	The way out

06 What to fix first

- 01 Get every call answered and booked
A caller who reaches voicemail rings the next company on the list. Every call answered and booked, day or night, by a person or by AI set up the way you want it, is the cheapest thing on this list and the one that pays back fastest.
~\$60,000 a year, on the arithmetic in 02
- 02 Get someone other than you quoting
Every quote in the business waits for you. Pick one person, sit with them for a week of quotes, and let them write the next twenty with you checking them.
- 03 Chase every quote twice
A quote that goes out and is never mentioned again is work you have already paid to win. Two follow-ups, on a written day each, is a rule one person can hold.
- 04 Ask for a review on every job
You have 40 reviews and the busiest shop near you has 300. Ask on the day the job is finished, from the van, every time.
- 05 Put your own work on the listing
You have 30 photographs on your listing and the quietest of the three shops nearest you has 90. A phone in a pocket on every job fixes that in a fortnight.

That is what can be seen from outside. The audit is the whole business, with the books open, in person.