



# HVACPro

Residential HVAC Service Business



# HVACPro Residential HVAC Service Business How-To-Do Book

---

*HVACPro is a complete masterclass set of residential HVAC service  
business operating and work delivery procedures.*

*Includes the essential owner, manager & staff business & work delivery  
function training.*

©October 10, 2024, Join HVAC Success, LLC

Residential HVAC Business Growth Club

P: (800) 240-2823

E: [News@JoinHVACSuccess.com](mailto:News@JoinHVACSuccess.com)

W: [www.JoinHVACSuccess.com](http://www.JoinHVACSuccess.com)

# Introduction

What do residential HVAC service business owners or their staff want? They want success, more leads or opportunities, make more money, and free up more time for themselves and their families. However, most of us have a problem. There is a villain called *'too many distractions,'* which refers to the various challenges and obstacles that prevent them from achieving their goals, such as inefficient procedures, lack of training, or poor customer service. They need business help, as found in this textbook.

**This textbook and our comprehensive online support system efficiently help fix this. Our online support includes [specific resources or tools], which can be accessed through our website or [specific platform].**

“I looked at all the major consulting services and felt that Join HVAC Success’s HVACPro offered the best value. We are using his flat rate repair service, HVAC & ductless mini-split price guides and their HVAC professional business and work delivery procedures found in this textbook. They provide right at my desktop’s online implementation support. We view their services as complete business system, pricing system and an affordable alternative to a franchise.”

**Andrew Conrady**  
Kelly’s Heating & Air, TX

“We have been using HVACPro for six years and can only say great job to Join HVAC Success and their team. Our growth has been consistent since we started on the program and our profits are up. I have found if you just follow the program you can become a very professional and harvest more opportunities that we often overlooked in the past. The best part is we are now sustainable and have a place to train our new hires. I would highly recommend this program. “

**Clint Green**  
Premier Heating & Air Conditioning, ID

This guide provides a practical and efficient strategic business and career advancement development plan, empowering you to succeed in your HVAC business today!

- We are hyper-focused on profitable revenue growth and will help you to move up to 400% more boxes off the shelf.
- We provide you with a business model similar in scope to HVAC franchise business models, supported by live weekly meetings.
- We provide your managers and staff 24/7 job-specific training on professional work delivery procedures and forms on their desktops, laptops, or handheld devices.
- With this guide, you can Achieve sustainable success and transform your HVAC business skills to outperform the competition, inspiring you to reach new heights in your industry.
- Imagine what your HVAC Business's performance would look like if you could learn to run your business more like the best.

# Contents

<b>Introduction</b> .....	<b>ii</b>
The Many HVAC Business & Career Advancement Benefits.....	viii
<b>Welcome to the Fastest Means to Success</b> .....	<b>9</b>
<b>We Have a Poor Profitability Problem</b> .....	<b>12</b>
Common Poor Profitability Symptoms .....	13
Common Causes Poor Profitability .....	14
<b>Profitably Growing Your Business or Advancing Your Career</b> .....	<b>19</b>
Basic Business Operating Rules of Success .....	20
Where to Start Your Business Growth or Career Development? .....	21
Phase #1: Proper Pricing, Increase Leads & Conversion Rates Webinars .....	22
Phase #2: Increase Operating Efficiencies & Driving the Business Webinars.....	22
Phase #3: Recruiting, Staffing & Improving Operating Efficiency Webinars .....	23
Job Training Included In This Textbook.....	23
<b>#1 How to Price Your HVAC Services to Make a Fair Profit</b> .....	<b>25</b>
Step #1 - Determining Your Flat Rate Hourly Vehicle Cost Rate.....	28
Step #2 - Determining Your Flat Rate Hourly Technician Cost Rates.....	30
Step #3 - Determining Your Repair Warranty Reserve Cost Rates .....	31
Step #4 - Determine Your Monthly & Annual Service Agreement Cost Rates .....	34
Step #5 - Determining Your Flat Rate Replacement Hourly Truck and Travel Costs .....	36
Step #6 - Determining Your Flat Rate Replacement Crew Labor Cost Rates.....	36
Step #7 - Determining Your Replacement Warranty Reserve Cost Rate.....	38
<b>#2 How to Drive Consistent Growth with Proven Lead Generation Strategies &amp; Tactics</b> .....	<b>40</b>
Why You Need a Professional Website Optimized for Search Engines .....	40
5 Key Website Optimization Strategies .....	41
2 Key Off-Website Website Optimization Strategies.....	43
Pay Per Click Versus Unpaid Listings.....	44
Calculating Your Pay-Per-Click Rate .....	45
Calculating Your Pay-Per-Click Budget.....	45
Structured Call Handling Using Onsite Opportunity Assessment Forms .....	46
Onsite Repair “Check-In” Opportunity Assessment Survey Form .....	47
Onsite Repair “Check-Out” Opportunity Assessment Survey Form .....	49
Onsite System Replacement Opportunity Assessment Form.....	51
<b>#3 How to Win More Business by Differentiating Your Services</b> .....	<b>54</b>

Service Agreement Brand & Associated Value Positioning Statement .....	56
<b>#4 How to Harvest More Business With Proactive Selling Strategies &amp; Tactics .....</b>	<b>58</b>
Professional 4-Step Consultative & Trust Selling Approach .....	59
Why the Need to Standardize the Service Call Handling Process?.....	60
Proactive Repair Trust-Selling Standards Procedures & Forms .....	62
Understanding the Service Agreement Business.....	68
Proactive Service Agreement Trust-Selling Standard Procedures & Forms .....	73
Understanding the System Replacement Business.....	77
Proactive System Replacement Trust-Selling Standard Procedures & Forms .....	77
<b>#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards .....</b>	<b>94</b>
Establishing Service Repair Work Delivery Standard Tasking Procedures & Forms .....	99
Establishing Service Agreement Work Delivery Standard Tasking Procedures & Forms .....	101
Establishing System Replacement Work Delivery Standard Tasking Procedures & Forms .....	103
Establishing Equipment Start-up & Maintenance Tasking Procedures & Forms.....	114
Establishing Written Quality Assurance Standard Procedures.....	114
Establishing Accounts Receivable Aging Practices.....	115
Establishing Accounts Receivable Aging Schedule.....	117
Accounts Receivable Aging Schedule .....	117
Establishing Inventory and Tool Control Standard Procedures .....	119
Establishing Customer Care Call Handling Standard Procedures .....	127
Establishing After-Hours Emergency Standby Procedures .....	128
Establishing Standard Billing Procedures.....	131
Establishing Field Labor Optimization Strategies.....	132
<b>#6 How to Protect the Business with Proper Terms &amp; Conditions .....</b>	<b>134</b>
Repair Service Payment & Liability Protection Terms & Conditions.....	135
Example Service Agreement Payment & Liability Protection Terms & Conditions .....	137
System Replacement Payment & Liability Protection Terms & Conditions .....	139
<b>#7 How to Retain the Best People with Proven Employee Retention Strategies .....</b>	<b>142</b>
Work Delivery Standard Procedures Facilitate Predictability.....	142
Performance-Based Written Job Descriptions Set Expectations .....	143
Making Informed Decisions When Hiring or Firing Field Staff.....	144
How to Implement a Company Culture of Success.....	145
Performance Incentives to Motivate Field Staff .....	147
Performance Incentive Plan for Office, Technicians & Installers.....	148

Performance Incentive Plan for Comfort Advisors .....	151
<b>#8 How to Drive Profitability Using Key Performance Indicators .....</b>	<b>155</b>
Keep Your Business Using KPIs.....	156
Establish Opportunity Conversion and Productivity KPIs .....	157
Establish Financial KPIs & Rules-Based Management .....	158
Driving Profitability Using Financial KPIs.....	160
Driving Down the Cost-of-Goods-Sold KPI .....	161
Driving Down Overhead KPI.....	162
Driving Up the Net Profit Before Taxes KPI.....	162
Prevent Running Out of Money Using Break-Even Revenue KPIs .....	163
The Power of Using KPI' to Increase Profitability .....	163
<b>#9 How to Efficiently Organize the Business for Growth .....</b>	<b>165</b>
Efficient Residential HVAC Business Organizational Structure .....	166
Efficient Office Admin Department Organizational Structure.....	168
Efficient Sales Department Organizational Structure .....	168
Efficient Service Department Organizational Structure .....	168
Efficient Installation Department Organizational Structure .....	168
Efficient Construction Department Organizational Structure .....	169
Forecasting Labor Staffing Requirement by Work Catagory Procedure.....	169
<b>#10 How to Implement Proper Customer Care Call Handling Procedures .....</b>	<b>172</b>
Importance of Good Customer Care.....	172
Customer Care Call Handling Script .....	173
Managing an Upset Caller .....	176
Crucial Hiring Criteria for the Customer Care Function .....	178
Dispatcher Technical or Non-Technical Support Consideration .....	178
Assigning and Dispatching Service Technicians .....	178
Accurate Recording of Calls and Assignments .....	179
Ordering Parts for Open Calls .....	179
Parts Expedition to Complete Service Calls .....	179
Providing Technical Support to the Field .....	180
Service Call Record Keeping.....	180
Service Performance Reporting .....	181
Customer Care/Dispatch Onboarding.....	183
<b>#11 How to Forecast Your Monthly Spend Plan .....</b>	<b>186</b>

Why You Need a Monthly Spend Plan Budget.....	186
BudgetPro Produces a Monthly Spend Plan - Repairs .....	190
BudgetPro Produces a Monthly Spend Plan - Maintenance Agreements .....	191
BudgetPro Produces a Monthly Spend Plan - System Replacements.....	192
BudgetPro Produces a Monthly Spend Plan – New Construction .....	193
<b>#12 How to Recruit and Retain Top Performers.....</b>	<b>194</b>
Proven Strategies to Help You Recruit the Best:.....	194
Proven Strategies to Help You Retain the Best.....	195
Why Do So Many Contractors Make Such Bad Hiring Decisions .....	197
The Many Costs of Making a Bad Hire .....	197
11-Tips for Hiring the Right Candidate.....	198
Proper Hiring Employees Checklist .....	200
Screening the Applicant Resume Checklist .....	201
6-Behavioral Interview Questions You Must Ask.....	203
Types of Interview Questions.....	205
9-Step Interviewing Process.....	207
Post-Interview Checklist.....	209
Candidate Selection Checklist .....	209
You Cannot Afford Not to Conduct Background Checks.....	210
Assessing The New Hire Training Needs .....	211
The Coaching Process to Develop Individuals.....	213
Proper Counseling Process to Change Troublesome Work Behaviors .....	214
<b>#13 How to Select and Implement Field Management Software.....</b>	<b>216</b>
Selecting Field Service Management Software Checklist .....	218
<b>#14 How to Self-Develop Your Leadership and People Skills.....</b>	<b>219</b>
Establishing a motivating climate and culture .....	220
Basic Compensation and Financial Incentives .....	220
The 4 Major Characteristics of a Successful Leader .....	221
When to Use the 4 Different Leadership Styles .....	223
The Top Leadership Skills to Improve .....	223
Leadership Skill Self-Development Plan.....	230
<b>Appendix A – Complete Set of Operating &amp; Work Delivery Documents.....</b>	<b>232</b>
<b>Appendix B –Performance-Based Job Descriptions .....</b>	<b>241</b>
Dispatcher/Customer Care Specialist Job Description.....	243



Residential Replacement Comfort Advisor Job Description .....	246
Service & Maintenance Technician Job Description .....	250
Residential Equipment Replacement Installer Job Description .....	255
<b>Appendix C – Equipment Start-up Test &amp; Verification Procedures.....</b>	<b>260</b>
AccuTask Packaged RTU Heat/Cool - Air-Cooled Annual Maintenance Inspection .....	265
AccuTask Split-System Heat/Cool - Air-Cooled Annual Maintenance Inspection .....	268
<b>Appendix D – Join The HVACPro Growth Club .....</b>	<b>271</b>
<b>Appendix E – Residential Staff Job Training Online Class Descriptions.....</b>	<b>273</b>
General Manager/Operation Manager Job Training .....	274
Marketing Manager Job Training .....	289
Sales Manager Job Training .....	299
Comfort Advisor Job Training.....	311
Service Manager Job Training .....	316
Dispatcher/Customer Care Manager Job Training.....	329
Selling Technician Job Training .....	333
Lead Technician/Technician Job Training .....	341
Installation/Construction Manager Job Training .....	347
Crew Chief/Installer/Helper Job Training .....	354
Truck Driver/Warehouse Supervisor Job Training.....	356
Office Manager Job Training .....	363
Receptionist Job Training.....	370
Bookkeeper Job Training.....	373
Accounting Job Training .....	376
Human Resource Manager Job Training.....	380
<b>Index.....</b>	<b>388</b>



# *The Many HVAC Business & Career Advancement Benefits*

## **OBTAIN A CLEAR PATH FOR BUSINESS OWNERS OR CAREER ADVANCEMENT**

This textbook provides a prioritized step-by-step strategic business development tasking plan to implement best practice procedures within your business. We present today's best practice sequence labor tasking process & forms required to complete each business management and work delivery function of the company. These business and work delivery functions are also packaged into standard industry job training for each member of your business.

## **INCREASE YOUR CHANCES OF SUCCESS**

Successful contractors know it is all about managing people and procedures that enable success—methods that help you consistently capture your fair share of revenue and profit opportunities. Customers have gone from negative net profit before taxes to 30%+ within three months of implementing textbook best practice HVAC business and work delivery procedures.

## **PERFORM RESIDENTIAL LEAD GENERATION BETTER.**

In this textbook, we provide residential lead generation strategies for your repair, service agreement, replacement, and retrofit/design-build project services.

## **SELL YOUR WORK BETTER**

We provide value-based selling procedures for residential service agreements and projects, which offer our clients up to 60% or more close rates at higher gross profit margins than price-only selling methods.

## **PRICE YOUR WORK BETTER**

We provide best-practice repair service, replacement installation, retrofit, and design-build pricing methods.

## **ORGANIZE YOUR WORK BETTER**

We provide a complete set of *proven business and work delivery procedures* to train your staff. Operating and work delivery procedures your staff can replicate every time. We also help you right-size to full staff utilization and manage your team to procedures.

## **OBTAIN UNLIMITED ACCESS TO BUSINESS& STAFF TRAINING**

Our HVACPro Masterclass Club offers unlimited access to online LIVE staff job education and implementation training focused on the HVAC process.



**JOINHVACSUCCESS**.COM  
TRANSFORM INTO A SERVICE POWERHOUSE

HVACPro Sales Growth Program provides a one-stop, right at the Dealer's desktops, complete HVAC residential service business operating resource center, similar in scope to today's HVAC franchise models.

