HVAC BUSINESS PLAN

Company Name: ________________________________

Owner Name: ________________________________

Date: ________________________________

Phone: ________________________________

Email: ________________________________

Website: ________________________________

Confidential Business Document

1. Executive Summary

Write this section last but place it first. Summarize your entire plan in one page or less.

Mission Statement

What does your company do and why does it exist? Keep it to 1-2 sentences.

Mission: ____

: ____

Vision Statement

Where do you see your company in 3-5 years?

Vision: ____

: ____

Business Objectives

List 3-5 specific, measurable goals for the first 1-3 years.

Year 1 Goal: ____

Year 2 Goal: ____

Year 3 Goal: ____

Funding Request

If seeking funding, state the exact amount and how it will be used.

Total Amount Requested: ____

Primary Use of Funds: ____

2. Company Overview

Document the basic setup of your HVAC company.

Field	Details
Business Name	
Legal Structure	
Owner / Founder	
Years of HVAC Experience	
Office Location	
Service Area Radius	
EPA 608 Certification	
State Contractor License	
NATE Certification	
Other Certifications	
EIN / Tax ID	

Unique Selling Proposition (USP)

What sets your business apart from local competitors? (e.g., same-day service, upfront pricing, eco-friendly systems)

USP: ____

: ____

3. Market Analysis

Research your local market to prove demand exists and identify gaps.

Target Customer Profile

Factor	Your Target
Customer Type (Residential / Commercial / Both)	
Age Range	
Income Level	
Property Type (Single-family, Apartments, Offices)	
Geographic Focus	

Competitor Audit

Search Google Maps and Yelp for HVAC companies in your service area. Fill in at least 3 competitors.

Competitor Name	Services Offered	Pricing Range	Google Rating	Weakness You Can Exploit

Seasonal Demand Planning

Note your peak and slow months, and how you plan to handle the gaps.

Season	Expected Demand	Strategy
Summer (Jun-Aug)		
Fall (Sep-Nov)		
Winter (Dec-Feb)		
Spring (Mar-May)		

4. Services and Pricing Strategy

List every service your company offers. Be specific. Avoid vague terms like 'HVAC solutions.'

Service	Pricing Model	Price Range	Avg. Job Time	Profit Margin
AC Installation				
AC Repair				
Furnace Installation				
Furnace Repair				
Duct Cleaning				
Thermostat Installation				
Indoor Air Quality Testing				
Preventative Maintenance				
Emergency / After-Hours Service				
Annual Maintenance Contract				
(Add Your Service)				

Parts Markup Strategy

Standard Markup Percentage on Parts: ______________________________

Emergency Markup Percentage: ______________________________

5. Marketing and Sales Plan

Outline how you will attract leads and convert them into paying customers.

Marketing Channels

Channel	Monthly Budget	Expected Leads/Mo	Tracking Method
Google Business Profile			
Google Local Services Ads			
Local SEO / Website			
Social Media			
Referral Program			
Direct Mail / Flyers			
Email Marketing			
(Add Channel)			

Annual Marketing Budget

Total Gross Revenue (Projected): ____

Marketing Budget (7-8% of Revenue): ____

Monthly Marketing Spend: ____

Sales Strategy

How will you convert leads into booked jobs? Describe your sales process.

Average Response Time Goal: ____

Estimate Delivery Method (On-site / Phone / Digital):

____

Follow-Up Process: ____

Referral Incentive: ____

6. Operations Plan

Describe how your business runs on a normal workday, from the first customer call to the final invoice.

Daily Workflow

Map out your service process: call handling, scheduling, dispatching, on-site work, job completion, invoicing.

Step 1: ______________________________________

Step 2: ______________________________________

Step 3: ______________________________________

Step 4: ______________________________________

Step 5: ______________________________________

Equipment and Tools Checklist

Item	Est. Cost	Owned / Needed
Service Van		
Refrigerant Recovery Machine		
Manifold Gauge Set		
Vacuum Pump		
Leak Detector		
Multimeter		
Combustion Analyzer		
Safety Gear (Gloves, Goggles)		
Hand Tools (Wrenches, Cutters, etc.)		
(Add Item)		

Software and Technology

Function	Tool / Software	Monthly Cost
Scheduling & Dispatching		
GPS Tracking		
Invoicing & Payments		
Accounting		
CRM / Customer Management		

Staffing Plan

Role	Year 1	Year 2	Year 3	Annual Salary
Owner / Lead Technician				
HVAC Technician				
Dispatcher / CSR				
Sales Rep				
Office Admin				

7. Financial Projections

Show lenders and investors that your numbers hold up. Most banks require 3-year projections.

Startup Costs Breakdown

Category	Estimated Cost	Actual Cost
Tools & Equipment	$5,000 - $25,000	
Service Vehicle	$8,000 - $40,000	
Licensing & Insurance	$2,000 - $5,000	
Marketing & Website	$2,000 - $5,000	
Office Setup & Supplies	$500 - $2,000	
Working Capital (3 Months)	$10,000 - $15,000	
TOTAL	**$27,500 - $92,000**	

Monthly Revenue Forecast

Month	Jobs Completed	Avg. Ticket Size	Total Revenue	Total Expenses
January				
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				
YEAR TOTAL				

Break-Even Analysis

Calculate how many jobs per month you need to cover all expenses.

Metric	Your Numbers
Total Monthly Fixed Costs (rent, insurance, software, loan payments)	
Average Revenue Per Job	
Average Cost Per Job (labor + materials)	
Profit Per Job (Revenue - Cost)	
Jobs Needed to Break Even (Fixed Costs / Profit Per Job)	

3-Year Revenue and Profit Projections

Metric	Year 1	Year 2	Year 3
Total Revenue			
Total Expenses			
Net Profit			
Profit Margin %			
Number of Employees			
Avg. Jobs Per Month			

Funding Requirements

If you need outside funding, specify the amount and what each dollar covers.

Total Funding Needed: ______________________________

Source (Bank Loan / SBA / Investor / Personal Savings): ______________________________

Repayment Plan: ______________________________

8. Risk Assessment

Identify potential threats to your business and plan how to handle each one.

Risk	Impact (Low/Med/High)	Mitigation Strategy
Seasonal revenue dips		
Equipment shortage or failure		
New competitor entering market		
Technician turnover		
Economic downturn		
(Add Risk)		

9. Appendix Checklist

Attach supporting documents to strengthen your business plan.

Document	Attached?	N/A
EPA Section 608 Certification		
State HVAC Contractor License		
NATE Certification		
Business Registration / LLC Filing		
Proof of Insurance (GL, WC, Auto)		
Personal Financial Statement		
Tax Returns (Last 2 Years)		
Market Research / Demographic Data		
Customer Testimonials or References		
Supplier Agreements or Quotes		