

HOMEWORK WORKSHEET

HVAC Marketing Fundamentals

Five short exercises to move your marketing from guessing to measurable — designed to be completed in about 60 minutes total, on your own or with your team.

HOW TO USE THIS WORKSHEET

This worksheet pulls together the five action items from the HVAC Marketing Fundamentals webinar. Each exercise is self-contained. You can print it and fill it in by hand, or type directly into the PDF. Work through them in order — each one builds the numbers, systems, and routines the later ones rely on.

| # | Exercise | Time | Done |
|---|---|--------|--------------------------|
| 1 | Know Your Best Customer (5 Questions) | 15 min | <input type="checkbox"/> |
| 2 | The 4 Numbers Every Owner Must Know | 20 min | <input type="checkbox"/> |
| 3 | Google Business Profile — 6-Point Audit | 30 min | <input type="checkbox"/> |
| 4 | Your Monthly Scorecard | 10 min | <input type="checkbox"/> |
| 5 | Your 30-Day Action Plan | 15 min | <input type="checkbox"/> |

YOUR INFO

Name
Company
Date Started
Target Complete Date

Who Is Your Actual Best Customer?

Answer these 5 questions tonight. Your answers become the customer avatar every ad, web page, and phone script should speak to.

Most HVAC owners answer, "Anyone who needs heating or AC." That answer costs you money — when everyone is your customer, your ads, truck wrap, and website speak to no one in particular.

1. What was the job size of your last 10 best tickets?

List each ticket amount, then average them.

| | |
|----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |

Average ticket size: \$ _____

2. Are those homes in 2–3 specific zip codes? Which ones?

Zip 1: _____ Zip 2: _____ Zip 3: _____

3. Were they homeowners or landlords? Ages? Length in home?

4. Did they call on the first breakdown, or shop 3 quotes?

5. What did they care about most — price, speed, or trust?

Price — lowest number wins **Speed** — answers phone, shows up fast **Trust** — reviews, referrals, brand

YOUR BEST-CUSTOMER AVATAR

In one sentence, describe the customer every ad and web page should speak to:

The 4 Numbers Every HVAC Owner Must Know

Pull these from your last 90 days of jobs. If you can't, that's your first project — before any new ad campaign.

Reporting period: _____ to _____

COST PER LEAD

Target: < \$200

What one phone call costs you. Under \$200 on search is healthy. Over \$600 and something is broken.

Your CPL: \$

BOOKING RATE

Target: 70%+

Of the leads you generate, how many actually book? Under 50% means your CSR — not your marketing — is the leak.

Your booking rate: %

AVERAGE TICKET

Target: Know it!

Total revenue ÷ total jobs for the last 90 days. This tells you which leads are worth chasing.

Your avg ticket: \$

RETURN ON AD SPEND

Target: 4x+

For every \$1 you spend on ads, you want \$4 back. If you're at 2x or below, fix the channel or kill it.

Your ROAS: x

WHAT'S YOUR #1 LEAK?

Looking at your four numbers above, which one is furthest from its target — and what's your first theory on why?

Google Business Profile — 6-Point Audit

The free channel most HVAC dealers still ignore. An optimized GBP pulls roughly 3x the local leads of an abandoned one.

Pull up your GBP now (google.com/business). Work through each item, check it off, and note any action needed.

■ Important: Do NOT change your business name. Renaming a verified profile can trigger re-verification and tank your rankings.

| # | Done | Checkpoint | Action needed / notes |
|----|--------------------------|---|-----------------------|
| 01 | <input type="checkbox"/> | Profile claimed & verified If "Claim this business" still shows on your listing, every search is going to a competitor. | |
| 02 | <input type="checkbox"/> | Primary category set to HVAC Contractor Add secondary categories: Heating contractor, Air conditioning repair, Furnace repair. | |
| 03 | <input type="checkbox"/> | Service area covers every city you serve (max 20) Not just your home zip. List every suburb your trucks drive to. Be specific. | |
| 04 | <input type="checkbox"/> | 25+ photos uploaded, refreshed monthly Techs on jobs, trucks, installs, team. Profiles with 25+ photos get ~35% more clicks. | |
| 05 | <input type="checkbox"/> | All services & categories you offer are selected Transparency builds trust. Pick everything you actually do. | |
| 06 | <input type="checkbox"/> | Posting weekly (offers, seasonal reminders, install photos) Google rewards active profiles. Treat it like a simple social feed. | |

GBP SCORECARD

Current review count: _____ Current star rating: _____

Photos on profile: _____ Last post date: _____

Your Monthly Scorecard

Fill in this one-page report every month. 60 minutes. If you can't look at this once a month, you don't have a marketing program — you have hope.

Month: _____ Year: _____

| Metric | Target | Your number | On track? | Fix if off |
|---------------------------|----------------------------------|-------------|-----------|---|
| Calls received | Baseline + 10% | | | Ad spend, GBP activity, review count |
| Booking rate | 75%+ | | | CSR training, call scripts, hold time |
| Cost per lead | < \$150 search / < \$50 referral | | | Kill worst keyword; pause worst channel |
| Average ticket | Last-30-day baseline | | | Tech training, pricing, options presented |
| New Google reviews | 8–12 per week | | | Audit the 3-touch system; retrain techs |
| Membership signups | 25% of repair jobs | | | Tech scripts, offer math, plan tiers |

THIS MONTH'S #1 WIN

THIS MONTH'S #1 PROBLEM TO FIX

ONE CHANGE YOU'RE MAKING NEXT MONTH

The Next 30 Days — Exactly What to Do

Don't try to do all four weeks at once. That's how nothing gets done. Check off each task as you finish it and write the date completed.

WEEK 1 MEASURE

- | | | |
|--------------------------|--|------------------|
| <input type="checkbox"/> | Pull your last 90 days of jobs and calculate the 4 numbers | Date done: _____ |
| <input type="checkbox"/> | Audit your Google Business Profile against the 6-point checklist | Date done: _____ |
| <input type="checkbox"/> | Count Google reviews. Set a weekly goal. | Date done: _____ |
| <input type="checkbox"/> | Set up call tracking numbers for each channel | Date done: _____ |

WEEK 2 FIX THE FREE STUFF

- | | | |
|--------------------------|---|------------------|
| <input type="checkbox"/> | Update services, areas, and description on your GBP (do not change business name or address) | Date done: _____ |
| <input type="checkbox"/> | Upload 25+ fresh photos to GBP | Date done: _____ |
| <input type="checkbox"/> | Roll out the 3-touch review system (train techs + set up texts) | Date done: _____ |
| <input type="checkbox"/> | Add a sticky phone number and one clear CTA to your website; make sure content is unique to your shop | Date done: _____ |

WEEK 3 TURN ON ONE PAID CHANNEL

- | | | |
|--------------------------|--|------------------|
| <input type="checkbox"/> | Start Local Services Ads application (allow 4–6 weeks to activate) | Date done: _____ |
| <input type="checkbox"/> | OR launch one Google Search campaign on your best service | Date done: _____ |
| <input type="checkbox"/> | Write 3 Facebook ads for tune-ups, installs, or repairs | Date done: _____ |
| <input type="checkbox"/> | Mail postcards around your 10 best recent installs | Date done: _____ |

WEEK 4 BUILD THE ROUTINE

Send first past-customer tune-up / reactivation blast Date done:

Launch maintenance plan offer — train every tech Date done:

Set up your monthly scorecard (from Exercise 4) Date done:

Schedule a 90-day review date. Put it on the calendar. Date done:

90-DAY REVIEW DATE

Review date: _____

Now go book more jobs.



Any questions, please contact All Contractor Marketing.

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