ALL CONTRACTOR
YOUR TRUE ALLY

POST-WEBINAR WORKSHEET

HVAC Marketing Plan

Work through this after the webinar. Set aside about two hours with your last two years of job data and your recent marketing reports. When you're done, you'll have your marketing budget, your slow-season plan, and a 12-month calendar in your own handwriting.

Tuesday, November 17, 2026 · 3:00 – 4:00 PM EST · Hosted by **All Contractor** · Presented by **Chris Smith, Michele Smith & Brittany Cantatore**

NAME _____ COMPANY _____ CITY / MARKETS YOU SERVE _____

01 Start here — where you stand today

BASELINE

What did you spend on marketing last year? Ads, SEO, mail, agency fees — all of it	
Which months were slowest last year? Your gut answer — we'll check it in section 04	
Where do most of your leads come from right now? Referrals, Google, ads, repeat customers...	
How many maintenance-agreement members do you have? Write "0" or "don't know" — both are answers	

02 Know your 4 numbers

THE FOUNDATION

Pull your **last 90 days**. If you can't fill a row, getting that number is your first project — before any new campaign.

NUMBER	HEALTHY RANGE (FROM THE WEBINAR)	YOURS	ON TRACK?
Cost per lead Marketing spend ÷ leads	Under $200 on search · over $600 = something's broken		☐ Yes ☐ No
Booking rate Booked jobs ÷ leads	70%+ · under 50% = the leak is your CSR		☐ Yes ☐ No
Average ticket Revenue ÷ jobs	Your 90-day baseline — tells you which leads are worth chasing		☐ Yes ☐ No
Return on ad spend Revenue from ads ÷ ad spend	4x or better · 2x or below = fix it or kill it		☐ Yes ☐ No

03 Who is your best customer?

KNOW YOUR BUYER

You can't market to all three the same way. Estimate your own split, then **circle the one or two** you'll build everything around.

CUSTOMER TYPE	WEBINAR BENCHMARK	WHEN THEY BUY	% OF MY REVENUE
The Emergency Unit died — calls whoever answers first	40–50% of HVAC revenue	Peak seasons	
The Planner 10+ year-old system, gets 2–3 quotes	30–40%	Shoulder seasons	
The Maintenance Club Wants it to last, signs agreements	20–30%	All year — renews in fall	

04 Find your shoulder weeks

YOUR DATA

Export **booked jobs by month for the last two years** from your field service software. Any month below your yearly average is a shoulder month.

MONTH	JOBS — LAST YEAR	JOBS — YEAR BEFORE	2-YEAR AVERAGE	PEAK OR SHOULDER?
January				☐ Peak ☐ Shoulder
February				☐ Peak ☐ Shoulder
March				☐ Peak ☐ Shoulder
April				☐ Peak ☐ Shoulder
May				☐ Peak ☐ Shoulder
June				☐ Peak ☐ Shoulder
July				☐ Peak ☐ Shoulder
August				☐ Peak ☐ Shoulder
September				☐ Peak ☐ Shoulder
October				☐ Peak ☐ Shoulder
November				☐ Peak ☐ Shoulder
December				☐ Peak ☐ Shoulder
Monthly average				

My shoulder months: _____

KEY TAKEAWAY

Start shoulder-season campaigns about **3 weeks before the dip** — not once the phones are already quiet. Write those start dates on your calendar today.

05 Give every channel one job

ONE JOB EACH

When a channel has one job, you know exactly what to measure it on. Aim for **4–5 channels running at once**, so when one dips the others cover.

CHANNEL · ITS ONE JOB	WEBINAR COST PER LEAD	RUNNING NOW?	MY COST PER LEAD	MY MONTHS TO PUSH
SEO + Google Business Profile Get found, all year	Free · 1–3 months to build	☐ Y ☐ N		
Google Local Services Ads Catch the emergency	$80 – $140 · 1–2 days	☐ Y ☐ N		
Google Search Ads Win the planner	$80 – $250 · 2–3 weeks	☐ Y ☐ N		
Reviews Win the click when they compare	Free · every job, every week	☐ Y ☐ N		
Social (Facebook / Instagram) Create demand in the shoulders	$60 – $180 · 2–4 weeks	☐ Y ☐ N		
Direct mail Reach aging systems + neighbors	$60 – $180 · 2–4 weeks	☐ Y ☐ N		
Past customers + referrals Cheapest, highest-trust leads	$15 – $50 · same week	☐ Y ☐ N		

06 Four past-customer plays — pick your dates

CHEAPEST LEADS

Check the plays you'll run and write the date you'll send the first one.

	PLAY	FIRST SEND DATE
☐	**Spring & fall tune-up blast** — text + email every past customer 3 weeks before each shoulder season	
☐	**The anniversary touch** — one year after install, a note plus a discount toward any service	
☐	**Structured referral reward** — "send a neighbor; when they book, you both get $50 off"	
☐	**The "Did we earn it?" text** — six months after a repair: "How's the system running?"	

ASK YOUR MARKETING PARTNER

"Which channel is doing which job for us — and what did each one cost per booked job last quarter?" If they can't answer, you're spending by habit, not by plan.

07 Fund the slow months

MAINTENANCE AGREEMENTS

Each member gets two visits a year — and **you choose when**. Book them into your shoulder months.

MEMBERS TODAY	×	VISITS PER YEAR	=	TUNE-UPS TO BOOK INTO SHOULDER WEEKS
_____	×	2	=	_____

MEMBERS TODAY	×	PLAN PRICE PER YEAR ($)	=	REVENUE COLLECTED UP FRONT ($)
_____	×	_____	=	_____

My sign-up rate New members ÷ repair jobs last month		Target: **25% of repair jobs**. Offer it on every repair and install, and book the next visit before leaving the house.

08 Your marketing budget calculator

THE NUMBER

Builder work is bid, not marketed for — so **take new construction out** before you multiply.

GROSS REVENUE	−	NEW CONSTRUCTION REVENUE	=	RESIDENTIAL REPLACEMENT + SERVICE REVENUE	×	GOAL %	=	ANNUAL MARKETING BUDGET
$ _____	−	$ _____	=	$ _____	×	% _____	=	$ _____

	GOAL	% TO USE	WHEN IT FITS
☐	**Hold steady**	**5%**	Stable market — protect your current share
☐	**Grow**	**8%**	Most shops — funds 2–3 paid channels plus reviews, SEO, reactivation
☐	**Grow aggressively**	**10%**	New areas or service lines — make sure you can handle the calls

Worked example from the webinar: $2,500,000 gross − $500,000 new construction = $2,000,000 × 8% = **$160,000 / year** ($13,333 / month average).

My monthly average (annual ÷ 12): $ _____ — but don't spend it evenly. That's the next page.

09 Spend it by season, not by habit

12-MONTH PLAN

Peak months: **capture** demand (Google Ads at full spend). Shoulder months: **create** demand (social, mail, past-customer blasts, plan sign-ups). Use your shoulder months from section 04.

MONTH	OBJECTIVE	% OF BUDGET	$ BUDGET	CHANNELS TO PUSH THIS MONTH
January	☐ Capture ☐ Create			
February	☐ Capture ☐ Create			
March	☐ Capture ☐ Create			
April	☐ Capture ☐ Create			
May	☐ Capture ☐ Create			
June	☐ Capture ☐ Create			
July	☐ Capture ☐ Create			
August	☐ Capture ☐ Create			
September	☐ Capture ☐ Create			
October	☐ Capture ☐ Create			
November	☐ Capture ☐ Create			
December	☐ Capture ☐ Create			
Total		**100%**		

10 The monthly scorecard

MEASUREMENT

One page, about an hour, once a month. If a number is off, the fix is in the right-hand column.

METRIC	TARGET	MONTH 1	MONTH 2	MONTH 3	FIX IF IT'S OFF
Calls received	Baseline + 10%				Ad spend, GBP activity, review count
Booking rate	75%+				CSR training, call scripts, answering service
Cost per lead	<$150 search · <$50 referral				Kill the worst keyword or channel
Average ticket	Last-30-day baseline				Tech training, pricing, options presented
New Google reviews	8–12 per week				Audit the ask, retrain techs
Membership sign-ups	25% of repair jobs				Tech scripts, offer math, plan tiers

11 The 90-day test — kill it or scale it

DECIDE BY THE NUMBERS

Kill if cost per lead is 2x+ target, booking rate is under 35%, or ROAS is under 2:1. **Scale** if cost per lead is at target, booking rate is 55%+, and ROAS is 3:1 or better.

CHANNEL	COST PER LEAD	BOOKING RATE	ROAS	DECISION
				☐ Scale ☐ Keep ☐ Kill
				☐ Scale ☐ Keep ☐ Kill
				☐ Scale ☐ Keep ☐ Kill
				☐ Scale ☐ Keep ☐ Kill

12 Your 30-day action plan

DO THIS NEXT

WINDOW	WHAT GETS DONE	WHO OWNS IT	DONE BY
Week 1 Measure	Pull 2 years of jobs by month · calculate your 4 numbers · mark your shoulder months		
Week 2 Set the budget	Run the calculator · pick 5%, 8% or 10% · split it by season		
Week 3 Assign the jobs	One job per channel · call tracking on each · start the LSA application		
Week 4 Load the calendar	Schedule tune-up blasts + mail drops · launch the plan offer · book your 90-day review		

13 My three commitments

ACCOUNTABILITY

Write down three things you will actually do — with a date. Vague plans don't get done.

#	WHAT I'M COMMITTING TO	BY WHEN
1		
2		
3		

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Want help building your 12-month plan?

We'll walk through your numbers, your slow weeks, and your budget with you — and show you where each dollar should go. No charge, no obligation.

Ann Matheis · Director of Business Development
(404) 487-8253 · ann@allcontractor.com · allcontractor.com