

# HVAC BUSINESS PLAN

Company Name:	
Business Address:	
Phone Number:	
Email:	
Website:	
Date:	
Prepared By:	

## 1. Executive Summary

### Mission Statement:

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### Vision Statement:

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### Objectives:

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### Core Services Offered:

*Check all that apply and add custom services as needed*

- HVAC Installation
- HVAC Repair & Maintenance
- Furnace Repair
- Air Conditioning Services
- Ductwork Installation
- Thermostat Installation
- Indoor Air Quality Testing
- Commercial HVAC Services
- Emergency HVAC Services

## 2. Company Description

### Legal Structure:

Sole Proprietor  Partnership  LLC  Corporation  Other: \_\_\_\_\_

### Service Area:

List city, counties, or service radius

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### Startup Status:

New business  Currently in planning phase  Recently established

### Founders & Team Background:

Briefly describe your experience and qualifications.

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### Unique Selling Proposition (USP):

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## 3. Market Analysis

### Industry Overview

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### Target Market

Customer Segment	Demographics & Profile	Key Needs

### Competitive Analysis

Competitor Name	Strengths	Weaknesses
Your Advantage:		

## 4. Marketing & Sales Strategy

### Pricing Strategy

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Service	Price (\$)
AC Installation	\$
Furnace Tune-Up	\$
Hourly Repair Rate	\$
Annual Maintenance Plan	\$

### Promotion Channels

Channel	Description

## Sales Process Overview

### Lead Generation

Online Inquiries: \_\_\_\_\_

Cold Calling: \_\_\_\_\_

Partnerships/Referrals: \_\_\_\_\_

### Sales Process:

Initial Contact Method: \_\_\_\_\_

Conversion Rate Goal: \_\_\_\_\_

## 5. Operations Plan

### Startup Equipment & Tools

*Check all that apply and add your own*

- Service Van(s)
- Refrigerant Recovery Machine
- Manifold Gauge Set
- Vacuum Pump
- Leak Detectors
- Pipe Cutters, Multimeter
- Safety Gear (gloves, masks, glasses)

**Initial Equipment Budget: \$** \_\_\_\_\_

### Business Hours:

- Weekdays only    Weekend availability    24/7 Emergency

### Staffing Plan

Role	Number Needed
HVAC Technicians	
Office/Dispatch Assistant	
Sales/Estimator	

## 6. Financial Plan

### Startup Costs

Item	Estimated Cost (\$)
Tools & Equipment	\$
Vehicle(s)	\$
Website & Marketing	\$
Business Licensing & Insurance	\$
Working Capital (3 months)	\$
<b>Total Estimated Startup Cost</b>	\$

### Projected Monthly Revenue & Expenses (Year 1)

Category	Amount (\$)
Avg. Monthly Revenue	\$
Fixed Monthly Costs	\$
Variable Costs (per job)	\$
Profit Margin Goal (%)	\$

### Break-Even Analysis (Short Form)

Component	Amount (\$)
Monthly Fixed Costs	\$
Avg. Revenue per Job	\$
Avg. Cost per Job	\$
<b>Jobs to Break Even / Mo</b>	Jobs

## 7. Appendix

(Attach licenses, certifications, vendor agreements, insurance policies, etc.)

EPA Certification:  Yes  No

State Contractor License #: \_\_\_\_\_

Insurance Policy #: \_\_\_\_\_