

# **HVAC PLAYBOOK**

## **HVAC Business Startup Checklist**

A step-by-step guide for a smooth launch

# 1. Eligibility & Business Planning

Things do be done before you can legally operate

- ☐ Finish apprenticeship hours
- ☐ Pass EPA 608
- ☐ Confirm you meet state licensing eligibility
- ☐ Read state and city contractor rules
- ☐ Decide service mix (service, maintenance, installs, IAQ, duct, controls)
- ☐ Pick residential vs commercial focus
- ☐ Define service area by ZIPs you will actually drive
- ☐ Define target customer profile and core offers
- ☐ Build a lean business plan (startup costs, 12 month cash flow, breakeven, funding, exit plan)
- ☐ Org chart (future): Even as one truck, define future roles
- ☐ Set personal runway target and save it

# 2. Legal Setup & Core Business Formation

Legitimize your business in the eyes of the state, IRS, and customers

- ☐ Apply for contractor license, schedule exams, secure bond if required
- ☐ Buy insurance: general liability, workers comp, commercial auto
- ☐ Choose company name and check state availability
- ☐ Secure the .com and social handles
- ☐ Set up domain email
- ☐ Choose brand colors and fonts
- ☐ Design the logo and a one page brand guide
- ☐ Form the LLC
- ☐ Get EIN
- ☐ Draft operating agreement
- ☐ Register state and city business licenses
- ☐ Register for sales tax permit
- ☐ Open state payroll accounts (withholding and unemployment)
- ☐ Add inland marine for tools and an umbrella policy
- ☐ Set business runway target and secure LOC or equipment financing if needed
- ☐ Open business bank account
- ☐ Set up accounting software and chart of accounts
- ☐ Hire a CPA and load a tax calendar
- ☐ Choose pricing model (flat rate or time and material)
- ☐ Calculate burdened labor rate and overhead
- ☐ Set parts and equipment markup rules and trip fees
- ☐ Choose payment processor, ACH, surcharge policy
- ☐ Set up consumer financing provider
- ☐ Choose equipment brands and IAQ product lines
- ☐ Apply for distributor and supplier accounts
- ☐ Open trade credit lines
- ☐ Define install warranties, labor warranties, and callback policy
- ☐ Create contracts: service agreement, install contract, change order, lien notices
- ☐ Create Collections policy: Terms on deposits, progress payments, final payment deadlines, late fees.
- ☐ Build estimate, invoice, and proposal templates
- ☐ Purchase tablet (paper invoices are no longer the norm)
- ☐ Define sales process / follow-up schedule
- ☐ Write safety plan and PPE list (OSHA basics) OSHA requires: hazard communication, lockout/tagout, fall protection, respirator fit testing, heat illness prevention (if relevant to your state).
- ☐ Create refrigerant handling SOPs and logs (608 recordkeeping)
- ☐ Define permitting process with each AHJ you will use
- ☐ Pick CRM and dispatch software
- ☐ Pick flat rate book or estimating system
- ☐ Set up phone system and call tracking
- ☐ Set up cloud storage, and backups
- ☐ Enforce MFA and a password manager
- ☐ Create a forms and SOP repository for field and office
- ☐ Decide on Background checks / drug screening policy (common in residential HVAC)
- ☐ HR compliance basics (W-4, I-9, harassment policy, workers' rights posters)
- ☐ Employee handbook outline before your first hire (not after you "outgrow solo").

# 3. Operational Setup & Marketing Prep

The final setup before going live

- ☐ Buy essential tools and recovery equipment
- ☐ Acquire a reliable truck or van and insure it
- ☐ Design truck wrap and order magnets or decals
- ☐ Order uniforms and ID badges
- ☐ Create inventory management system / re-order points
- ☐ Build starter inventory and bin locations in the van
- ☐ Decide on hours / on call policy
- ☐ Shoot brand photos: headshots, van, before and afters
- ☐ Launch a simple website with clear CTAs and service area pages
- ☐ Create service agreement terms, pricing, etc
- ☐ Create and verify Google Business Profile
- ☐ Claim core citations (Apple Maps, Bing, Yelp, Angi, Thumbtack)
- ☐ Build a review funnel with scripts and automations
- ☐ Set up analytics, Search Console, and conversion tracking
- ☐ Create offers and a seasonal promo calendar
- ☐ Create referral Program
- ☐ Open Google Ads and Meta Business Manager accounts
- ☐ Build a basic email platform with a welcome series
- ☐ Price check against your market and adjust if needed

# 4. Go-Live & Early Growth

Get your first jobs and start scaling

- ☐ Soft launch to friends, family, and vendors
- ☐ Ask for first five reviews immediately after completed jobs
- ☐ Turn on light ads to start the flywheel (GBP posts, search, remarketing)
- ☐ Apply for LSAs when you have documents and reviews
- ☐ Track KPIs weekly (leads, booked jobs, average ticket, gross margin, ad CPL)
- ☐ Job cost every install and tune pricing based on data
- ☐ Document install and service SOPs and enforce them
- ☐ Build a hiring plan, handbook, onboarding checklists when you outgrow solo