



The HVAC Ad Budget Split Planner

Most budget advice hands you a percentage. This shows you how to find your own, because the right split depends on your job mix, your close rates, and your average tickets. Nobody else has those numbers.

Grab three things before you start: last year's jobs with what each one brought in, your close rate per channel if you track it, and what you are spending each month on each platform.

● WORKSHEET 1 — Find Your Revenue Mix

Every split starts here. Pull the last twelve months and drop every finished job into one of two buckets. Ignore lead counts completely, this is about money in.

Bucket A: Service and repair.

Diagnostics, repairs, maintenance plans, warranty work, tune-ups.

Bucket B: Replacement and install.

Full systems, heat pumps, mini-splits, ductwork, indoor air quality equipment.

	REVENUE	NUMBER OF JOBS	AVERAGE TICKET
Bucket A: Service and repair	\$		\$
Bucket B: Replacement and install	\$		\$
Total	\$		

Bucket A as a share of total revenue:

%

Bucket B as a share of total revenue:

%

What the answer means:

- **Bucket A is 70% or more.** You are a service business. Your starting split is 75 to 85% search, 15 to 25% Meta.
- **Neither bucket is above 60%.** You are balanced. Your starting split is 60 to 70% search, 30 to 40% Meta.
- **Bucket B is 50% or more.** You are an install business. Your starting split is 45 to 60% search, 40 to 55% Meta.

Write your starting split here:

% search / % Meta

This is a starting point, not your answer. Worksheets 2 and 3 move it.

• WORKSHEET 2 — Cost Per Booked Job, By Channel

Cost per lead is the number that talks contractors into the wrong split. This is the one that settles it. Run it for each channel over the last 90 days.

CHANNEL	SPEND (90 DAYS)	LEADS	BOOKED JOBS	REVENUE BOOKED	COST PER BOOKED JOB	REVENUE PER DOLLAR SPENT
Google LSA	\$			\$	\$	
Google PPC	\$			\$	\$	
Meta	\$			\$	\$	
Yelp	\$			\$	\$	

Cost per booked job = what you spent, divided by the jobs you actually booked. Not leads. Jobs.

Revenue per dollar spent = revenue booked, divided by what you spent. If you spent \$1,000 and booked \$5,000, that is 5x. This is the column that matters.

How to read it:

- **Under 3x, that channel is on notice.** It is not dead, but it needs to earn its budget back.
- **Over 8x, you are underspending.** That channel is working and you are leaving money on the table.
- **Ignore cost per lead on this page completely.** A \$40 lead that books a \$300 repair loses to a \$150 lead that books a \$12,000 system, every single time.
- **If you cannot fill in the booked jobs column, stop here.** You have a tracking problem, not a budget problem, and no split will fix it. You need call tracking and a way to tell which channel each lead came from before any of this works.

• WORKSHEET 3 — The Four Adjustments

Take your starting split from Worksheet 1 and adjust it. Each answer moves the number.

1. Can you chase a slow lead?

A Meta lead usually takes five or six attempts over a week or two before it books. Answer honestly.

- ☐ We have automated text and email follow-up running today → **no change**
- ☐ Someone calls new leads within the hour, manually → **subtract 10 points from Meta**
- ☐ Leads sit in an inbox until someone gets to them → **subtract 20 points from Meta and fix this first**

2. What is your close rate on quoted replacements?

- ☐ Above 40% → **add 5 points to Meta**
- ☐ 30 to 40% → **no change**
- ☐ Below 30% → **subtract 15 points from Meta**. More quotes will not help until the close improves.

3. Do you have install capacity in the next 60 days?

- ☐ Yes, crews are available → **no change**
- ☐ Partially, we are booking three weeks out → **subtract 5 points from Meta**
- ☐ No, we are full → **subtract 15 points from Meta**. Do not pay to create work you cannot get to.

4. What season are you entering?

- ☐ Shoulder month (Mar, Apr, Sep, Oct) → **add 10 points to Meta**
- ☐ Peak season (Jun, Jul, Aug, Dec, Jan) → **subtract 10 points from Meta**
- ☐ Anything else → **no change**

Your adjusted split:

% search /

% Meta

Two hard floors, after every adjustment:

Search never drops below 40%. It is the only channel that can bring you a job this week, and the only thing you can lean on in a slow one.

Meta runs at a serious number or it runs at zero. Meta needs enough leads flowing to work out who your buyers are. A trickle never teaches it anything, and you end up deciding Meta does not work when it never got a fair run. If your adjusted Meta number is too small to be serious, make it zero and come back to it next quarter.

● WORKSHEET 4 — The Seasonal Shift Calendar

The split is not one number for the year. Set the ratio once, then move it on this calendar. Fill in your own two numbers per row.

MONTHS	WHAT THE MONEY IS DOING	SEARCH	META
Jan and Feb	Heating emergencies, capture mode	%	%
Mar and Apr	Seeding the summer install pipeline	%	%
May	Transition, both running	%	%
Jun, Jul, Aug	Cooling emergencies, capture mode	%	%
Sep and Oct	Seeding the winter install pipeline	%	%
Nov and Dec	Heating emergencies, capture mode	%	%

The rule underneath the calendar: move the ratio, never switch a channel off. Start a channel again from zero and it has to learn everything over, which costs you roughly the first three weeks of whatever you put back in.

• THE REALLOCATION TRIGGERS

Pin this somewhere. These are the only five reasons to change the split between quarterly reviews.

- 1 Leads and booked revenue are moving in opposite directions.** Leads up but revenue flat means you are buying the wrong kind of job. Move money toward the bucket that is going hungry.
- 2 A channel has come in under 3x for two months running.** Not one month. Two. One month is noise.
- 3 Your install calendar has more than three weeks of open slots.** Move toward Meta. You need to create work, not catch it.
- 4 Your install calendar is booked more than four weeks out.** Move toward search. Take the quick work while the crews catch up.
- 5 Your close rate on replacements moved more than 10 points either way.** The math behind the whole split just changed, so run Worksheet 2 again.

Nothing else counts as a trigger. Not a competitor's new billboard, not one bad week, and not a platform rep telling you that you are underspending.

● THE 90-DAY REVIEW

One page per quarter. This is the whole review.

QUARTER	SPLIT RUN	COST PER BOOKED JOB, SEARCH	COST PER BOOKED JOB, META	REVENUE PER DOLLAR, BLENDED	WHAT WE CHANGED
Q1	/	\$	\$		
Q2	/	\$	\$		
Q3	/	\$	\$		
Q4	/	\$	\$		

One change per quarter, 10 to 15 points at most. Change two things at once and you learn nothing from either.

Built by RS Gonzales. We run this planner for HVAC contractors across the U.S. before we touch a campaign. If you want us to run it against your numbers, book a strategy session at rsgonzales.com/book-strategy-session/