



Commercial HVAC Lead Source Checklist

Most residential HVAC owners who want commercial work start by waiting for it to call. Commercial accounts go to contractors already on a vendor list, so this checklist turns the hunt into a plan: the paperwork first, then seven places to look, then 90 days of steps.

Set aside an hour with your customer list, your insurance agent's number, and your calendar.

● PART 1: Paperwork Buyers Ask For

Commercial buyers ask for these before they add you to a vendor list. Have each one ready to send the same day.

ITEM	WHAT IT IS	HAVE IT?	WHERE IT LIVES
Certificate of insurance (COI)	A one-page form from your insurance agent showing your general liability and workers' comp coverage	☐	
W-9	The IRS form with your business name and tax ID number	☐	
Contractor license	Your license number, confirmed to cover the commercial work you plan to do	☐	
Safety record (EMR)	Your Experience Modification Rate from your workers' comp insurer, where 1.0 is average	☐	
Response time and service area	One line on how fast you reach a building, and which areas you cover	☐	
One-page maintenance offer	What a commercial tune-up includes, how often you visit, and your priority service promise	☐	

● PART 2: Seven Places to Look

Write the first step you will take for each source and who owns it. Start at the top, because the first sources are the ones that already know your work.

#	LEAD SOURCE	FIRST STEP	WHO OWNS IT	STARTED?
1	Homeowners you serve who own a business	Pull every business owner from your customer list and tag them in your CRM.		☐
2	Light commercial maintenance agreements	Write one simple commercial maintenance offer with regular visits and priority service.		☐
3	Property managers and building owners	List five property managers in your service area and visit them with your COI and offer.		☐
4	Facility management networks	Ask the store managers you already serve which platform their brand uses for repairs.		☐
5	General contractors and bid boards	Decide whether you have an install crew to spare before you register on a bid board.		☐
6	Trade associations (BOMA, IFMA)	Find your nearest local chapter and put its next event on the calendar.		☐
7	Google search	Search your company name and “commercial HVAC” with your city. Note what a facility manager would find.		☐

● PART 3: Is Your Shop Ready?

Answer each one honestly. If two or more are **No**, start with source 1 and source 2 only, and grow from there.

QUESTION	YES / NO
Do you have a technician experienced with rooftop units and larger commercial equipment?	
Does your license cover the buildings and equipment sizes you plan to work on?	
Do your insurance limits meet what property managers in your area ask for?	
Can you carry payroll and parts for 30 to 60 days while a commercial invoice is paid?	
Does someone answer the phone during business hours, with a clear response time after hours?	

● PART 4: Your First 90 Days

MONTH	WHAT TO DO	DONE?
Month 1	Gather every item in Part 1. Pull business owners from your customer list and send them your commercial maintenance offer.	☐
Month 2	Visit five property managers and ask to be their backup contractor. Go to your first BOMA or IFMA chapter event.	☐
Month 3	Follow up with every manager you met. Check what your website shows a commercial buyer, and add a page for the building type you most want to serve.	☐

Built by RS Gonzales. We market commercial and residential HVAC contractors across the U.S. If you want help working out where your first commercial accounts will come from, book a strategy session at rsgonzales.com/book-strategy-session/