



HVAC Marketing System Map

Most HVAC owners know their marketing slows down when the phone gets busy. Few have checked which parts stop, who was doing them, and what it cost by the time the slow season came around.

This map takes about 30 minutes. Work through it at a desk, with your phone and your last two months of estimates nearby, then use the scoring guide to decide what to build first.

● PART 1: The Six-Part Check

Check each part the way a homeowner would meet it. Mark **Yes** if it happens on its own every time, **Partly** if it happens only when someone remembers, and **No** if it does not happen at all.

#	PART OF THE SYSTEM	HOW TO CHECK IT	RUNS ON ITS OWN? (YES / PARTLY / NO)	WHO DOES IT NOW?
1	Missed-call text back	Call your business number from another phone and let it ring out. Does a text arrive within a few minutes?		
2	Online booking	Open your website and your Google Business Profile on a phone. Can a homeowner pick a time without calling you?		
3	Estimate follow-up	Pull every replacement estimate from the last 60 days. How many got a second follow-up after the first one?		
4	Review requests	Check the date of your newest Google review. Does a review request go out after every job without anyone sending it?		
5	Past-customer reminders	When did your past customers last hear from you? Is the next tune-up reminder already scheduled?		
6	Ad rules	Do your ads have a schedule and a daily budget, or does someone switch them on and off by hand?		

● PART 2: The Busy-Week Test

Think back to your busiest week last season. For each task, write down who did it in a normal week and what happened to it that week.

TASK	WHO DOES IT IN A NORMAL WEEK	WHAT HAPPENED TO IT IN YOUR BUSIEST WEEK
Calling back missed calls		
Following up on replacement estimates		
Asking for reviews		
Replying to reviews		
Sending tune-up reminders		
Changing ads when you were booked out		

Any task with the same person's name in every row, usually the owner's, is a task that stops the moment that person gets busy.

● PART 3: Scoring Your Results

Count your **No** and **Partly** answers from Part 1, then start with the first part on this list that you marked No or Partly.

IF THIS PART IS NO OR PARTLY	WHY IT COMES FIRST	START WITH THIS
1. Missed-call text back	Every ad dollar you spend sends calls into this gap.	Turn on an automatic text for every missed call, and decide who answers after hours.
3. Estimate follow-up	Replacement estimates are the biggest jobs you can lose to silence.	Write three short follow-up messages about financing, the warranty, and install timing, and send them on a schedule.
4. Review requests	Homeowners look for recent reviews, and a busy season is when the count stalls.	Send the review request automatically when a job is marked complete.
2. Online booking	Homeowners who would rather not call can book while you work.	Add a booking calendar to your website and Google Business Profile for tune-ups and repair visits.
5. Past-customer reminders	Your past customers are the cheapest jobs to win back.	Load your customer list and schedule your next two seasonal reminders.
6. Ad rules	Ads switched off by hand tend to stay off too long.	Set an ad schedule and a daily budget, and decide where the money goes when you are booked out.

How to read it:

- **0 to 1 No or Partly answers.** Your system is mostly built. Spend 30 minutes a month checking your booked jobs and missed calls to keep it working.
- **2 to 3.** Fix them in the order shown, one a week, before the next busy season starts.
- **4 to 6.** Your marketing runs on your memory. Start with phones this week, because that gap costs you jobs every day.

● PART 4: Your Four-Week Setup Plan

Work through one group a week, in this order, and write down who owns each task.

WEEK	WHAT TO SET UP	WHO OWNS IT	DONE?
Week 1	Phones: missed-call text back, after-hours answering, and a test call to your own number at 7 p.m.		☐
Week 2	Booking and estimates: online booking on your website and Google Business Profile, plus follow-up messages for replacement estimates.		☐
Week 3	Reviews: a review request sent when each job is marked complete, and one person responsible for replies.		☐
Week 4	Past customers and ads: your customer list loaded, the next two seasonal reminders scheduled, and an ad schedule and daily budget set.		☐

What still needs you, even once it is built: calling back the leads the system catches, replying to reviews in your own words, changing the offer when the weather changes, and checking your numbers once a month.

Cost per booked job = what you spent on marketing, divided by the number of jobs it booked. It tells you more than cost per lead, because a cheap lead that never books is not cheap.

Built by RS Gonzales. We set up and run marketing systems for HVAC contractors across the U.S. If you want a second set of eyes on your results, book a strategy session at rsgonzales.com/book-strategy-session/