
Private Equity Competitor Audit Sheet

Most independent owners know which competitor worries them. Few have looked at that competitor the way a homeowner does, side by side with their own company, one question at a time.

This sheet takes about an hour. Fill in one column for your company and one for each competitor you want to check, then use the scoring guide to pick what to fix first.

● PART 1: Who Owns the Companies Around You

A company can keep its old name, trucks, and phone number for years after it sells. These are the quickest ways to find out who owns it now.

- **Read the About page closely.** Look for lines like “a proud member of the [Group] family of companies” or a parent logo in the footer.
- **Search the news.** Type the company name plus “acquired” or “partners with” into Google, and check local business news and trade press.
- **Check your state business filings.** Your Secretary of State’s website lists who registered the company and where, and an out-of-state parent often shows up there.
- **Look at their job ads.** Postings for technicians often name the parent company and its benefits package.
- **Compare phone numbers and booking pages.** Several local brands sending calls to the same call center or booking page usually share an owner.

COMPETITOR	STILL LOCALLY OWNED? (YES / NO / NOT SURE)	WHAT TOLD YOU	YEAR SOLD, IF KNOWN

● PART 2: The Side-by-Side Check

Answer each row for your company first, then for each competitor. Search from a phone the way a homeowner would, and use the name of each town you serve in the search.

#	WHAT TO CHECK	HOW TO CHECK IT	YOUR COMPANY	COMPETITOR 1	COMPETITOR 2
1	Google rating and review count	Search the company name on Google Maps.			
2	Date of the newest review	Sort the reviews by newest.			
3	Owner replies on the last 10 reviews	Count the replies, and note whether a person signed them.			
4	Technicians named in the last 10 reviews	Count the reviews that mention a technician by first name.			
5	Owner named on the homepage	Open the homepage and look for the owner's name and photo.			
6	"Locally owned" backed by specifics	Look for the owner's name, their town, and how many years they have served it.			
7	Top three on Google Maps	Search "AC repair [town]" for your three closest towns and note who appears in the map results.			
8	Local Services Ads showing	Search "AC repair [town]" and look for the listings at the top with the green Google Guaranteed check.			
9	Google Ads on install searches	Search "AC replacement [town]" and note whose ads appear.			
10	After-hours answering	Call your own number at 7 p.m. For competitors, check what their website and Google profile promise.			
11	Missed-call text back	Call your own number, let it ring out, and see whether a text arrives within a few minutes.		Not needed	Not needed
12	A repair-first promise	Look on the website for a line saying you recommend a repair when a repair will do.			
13	A financing offer	Look for a financing page or offer on the website.			

● PART 3: Scoring Your Results

Compare your company with the strongest competitor on each row, and mark it **Win**, **Tie**, or **Lose**. Then use these groups to decide where to start.

ROWS	WHAT IT MEASURES	IF YOU LOSE HERE, START WITH THIS
1 to 4	Reviews	Ask every customer for a review after every job, and reply to every review with your name on it.
5, 6, and 12	Your local story	Add the owner's name, town, years in business, and a repair-first line to your homepage and Google Business Profile. It costs nothing.
7	Google Maps	Work on your Google Business Profile for each town you serve, starting with the closest.
8 and 9	Ads	Do not try to match their budget on broad install searches. Move part of your budget to Local Services Ads and repair searches near your shop.
10 and 11	Phones	Fix after-hours answering and missed-call text backs before you spend another dollar on ads.
13	Financing	If they offer financing and you do not, add a financing option to your installs.

How to read it:

- **Losing on phones.** Fix this first, because every ad dollar you spend sends calls into the gap.
- **Losing on your local story.** Fix it this week. It takes one afternoon and answers the question homeowners already ask about ownership.
- **Losing on ads only.** You may be in better shape than it feels. A competitor can buy the top of the page, but not your reviews, your owner, or your distance to the customer.

● PART 4: Your Plan for the Next Month

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

WEEK	WHAT TO FIX	WHO OWNS IT	DONE?
Week 1	Your local story: owner's name and town on the website and Google Business Profile, a repair-first line, and replies to any unanswered reviews.		☐
Week 2	Phones: a person answering after hours, and an automatic text back for missed calls.		☐
Week 3	Reviews: the same review ask after every job, with a count of asks per technician.		☐
Week 4	Ads: move part of your budget from broad install searches to Local Services Ads and repair searches near your shop, then track your cost per booked job.		☐

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

Built by RS Gonzales. We help independent HVAC companies compete with bigger, better-funded competitors 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/