

FIELD SERVICE BUSINESS DIAGNOSTIC

The HVAC Revenue Leak Check

A five-minute review of three places where HVAC opportunities can disappear.

Before spending more to generate demand, make sure the demand you're already generating is being captured, converted, and carried forward.

Every HVAC company wants more customers. But before spending more to generate demand, it is worth checking what happens to the customers you already have coming through the door.

A missed call, an unworked estimate, or a past customer who never hears from you again can quietly become lost opportunity.

Use the checklist below to identify where your process is strong, where it may need attention, and where you may simply lack visibility.



01 CAPTURE

Before the booking: are inquiries being captured and moved toward an appointment?

CHECK	YES	NO	NOT SURE
1. Do you know what percentage of missed calls receive a response within your target time?	☐	☐	☐
2. Can you identify every new inquiry that has not received a response?	☐	☐	☐
3. When an inquiry comes in, is the customer's location, service need, and preferred timing captured consistently?	☐	☐	☐
4. Can a qualified customer move from inquiry to appointment without unnecessary back-and-forth?	☐	☐	☐
5. Is there a defined process for handling calls and inquiries when the office is busy, after hours, or during peak demand?	☐	☐	☐

WHY IT MATTERS

In urgent HVAC situations, homeowners may contact several companies. A fast, clear response gives your team a better chance to secure the appointment before the customer moves on.

METRIC TO WATCH

Missed-call response rate

Percentage of missed calls receiving a response within your target time.

FIRST STEP

Track every missed call for one week and record whether — and how quickly — it received a response.

A SIMPLE EXAMPLE

It's a 100° day. A homeowner's AC stops working and they call your company. Your office is already handling another customer, so the call goes to voicemail. You call back later — but by then, the homeowner has already booked someone else.

The problem wasn't necessarily your technician, your price, or your service. The opportunity disappeared before your team had a chance to compete for it.

02 CONVERT

After the estimate: are open opportunities being worked consistently?

CHECK	YES	NO	NOT SURE
1. Can you see which estimates are currently open and how long each one has been outstanding?	☐	☐	☐
2. Does every open estimate have a clear next step or follow-up date?	☐	☐	☐
3. Can you identify estimates that have gone more than 48 hours without follow-up?	☐	☐	☐
4. Is estimate follow-up consistent, or does it depend on someone remembering to do it?	☐	☐	☐
5. Do you track why estimates are won, lost, or still pending?	☐	☐	☐

WHY IT MATTERS

An estimate that has not been accepted is not necessarily a lost customer. Sometimes it is simply an unfinished conversation.

METRIC TO WATCH

Estimate follow-up rate

Percentage of open estimates receiving follow-up within 48 hours.

FIRST STEP

Export your current open estimates and identify which ones have had no follow-up in the last 48 hours.

03 RETAIN

After the job: are completed jobs creating future revenue?

CHECK	YES	NO	NOT SURE
1. Do you have a process for reminding customers about appropriate future maintenance?	☐	☐	☐
2. Do you reconnect with previous customers before relevant HVAC seasons or service periods?	☐	☐	☐
3. Can you identify customers whose equipment may be aging, repeatedly serviced, or approaching a replacement decision?	☐	☐	☐
4. Does every completed customer receive a follow-up that keeps the relationship active?	☐	☐	☐
5. Do satisfied customers have an easy way to review or refer your business?	☐	☐	☐

WHY IT MATTERS

A completed job does not have to be the end of the customer relationship. Maintenance, repeat service, replacement opportunities, reviews, and referrals can extend the value of a customer you have already earned.

METRIC TO WATCH

Customer re-engagement rate

Percentage of eligible past customers receiving a relevant follow-up during a defined re-engagement period.

FIRST STEP

Review your previous 12 months of customers and identify who has not received a relevant follow-up since their last service.

What Your Answers May Reveal

A pattern of "No" or "Not Sure" answers in a stage often points to a specific type of gap.

CAPTURE GAP

Opportunities may be disappearing before they become scheduled jobs.

CONVERSION GAP

Sales opportunities may be created but not consistently worked through to a decision.

RETENTION GAP

Completed jobs may not be producing their full future value.

THREE WAYS TO IMPROVE THE PROCESS

A

IMPROVE THE PROCESS

Assign clear ownership. Make one person responsible for each critical follow-up process and define what happens next.

B

USE EXISTING TOOLS

Use the CRM, field-service platform, calendar, email, SMS, or other tools you already have to create reminders, visibility, and consistent follow-up.

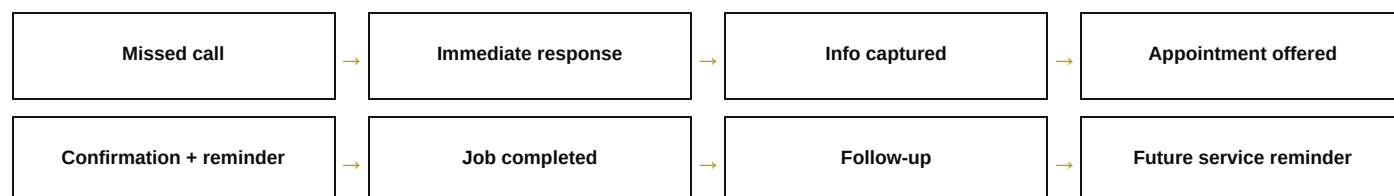
C

CONNECT THE WORKFLOW

Connect the steps so the next appropriate action can happen automatically, while keeping a human involved when judgment or conversation is needed.

Not every business needs the same approach. Use the simplest solution that reliably solves the problem.

ONE CONNECTED EXAMPLE



The goal is not to automate everything. It is to make sure important customer opportunities do not depend on someone remembering what to do next.

IF YOU MARKED SEVERAL "NO" OR "NOT SURE" ANSWERS

Start with one process. Do not try to fix everything at once. Choose the area with the clearest financial impact, assign ownership, measure the result for 30 days, and improve from there.

WANT TO GO ONE STEP FURTHER?

If you'd like, AI-Phen can walk through your answers with you in a short 15-minute review and help identify whether a process change, existing software, or automation could make the biggest difference.

Learn more at

ai-phen.com