One Big Media Company

❄ GOHIGHLEVEL SNAPSHOT · HVAC (HEATING AND COOLING)

HVAC Agency Sales Kit

Pitch, outreach, pricing and onboarding to land and keep clients in this niche.

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THE OPPORTUNITY

Selling to hvac

Your buyer: A residential HVAC company with a handful of service techs and one or two comfort advisors who sell replacements. The office juggles emergency no-heat and no-cool calls, seasonal tune-ups and replacement estimates, and the owner wants more recurring maintenance plan revenue to smooth out the slow shoulder seasons.

Why they buy:

- On the first hot or cold day of the season, calls come in faster than the office can answer, and missed calls go to the next company on Google.
- Replacement estimates go out and the comfort advisor never has time to follow up.
- Maintenance plan sign-ups depend on the tech remembering to mention them on every call.
- Shoulder seasons are slow and techs sit idle while past customers forget about tune-ups.
- Google reviews come in randomly instead of after every great service call.

Suggested resale pricing

Setup fee	Monthly
$500-$1,500	$297-$697

Price higher when you also run their ads and manage seasonal campaigns. Tie your value to maintenance plan growth, since members create recurring revenue the owner can feel.

Position it as the system that turns your ad leads into booked calls and recurring maintenance plan members, which is the number most HVAC owners care about. Launch the Maintenance Plan Enrollment and tune-up campaigns every shoulder season so you deliver visible results in the months when ads alone are weakest.

CLOSE

Pitch script

Quick question: on the first 95-degree day of the year, how many calls go to voicemail before someone in your office can pick up? Most HVAC owners tell me it's more than they'd like, and those homeowners just call the next company. We install a system that texts every missed call and web lead within seconds, flags no-heat and no-cool emergencies so your dispatcher calls those first, and books service visits straight onto your calendar with reminders. After the visit it follows up on replacement estimates, asks for Google reviews, and runs a campaign that invites every one-time customer to join your maintenance plan. More members means fuller schedules in spring and fall and more replacement opportunities down the road. It runs in the background, so your techs and office don't have to remember anything new. Could I show you how it works on a 15-minute call this week?

Cold email

Subject: missed calls on hot days

Hi {first name},

On your busiest days, how many calls go to voicemail before anyone can call back?

We set up an automated system for HVAC companies that texts every missed call and lead within seconds, flags no-heat and no-cool emergencies, books visits on your calendar and follows up on replacement estimates. It also runs a campaign that invites one-time customers to join your maintenance plan.

It works alongside your current dispatch software.

Open to a 15-minute walkthrough this week?

{your name}

Cold SMS

Hi {first name}, {your name} here. I help HVAC shops book more calls and sell more maintenance plans with instant missed-call texts and automatic follow-up. Worth a quick 10-min chat?

Social DM

Hey {first name}, noticed your team is busy this season. How do you handle calls you miss during the rush? I set up a system that texts them back instantly and grows maintenance plan sign-ups. Want to see it?

DELIVER

Offers & onboarding

Offer ideas for the client

- Spring AC tune-up special before the first heat wave
- Fall furnace or heat pump safety check
- Maintenance plan with two tune-ups a year, priority service and member repair pricing
- Free second opinion on any replacement quote
- Replacement financing options through the shop's lending partner

Client onboarding checklist

- Collect: logo, brand colors, business hours, service area, Google review link
- Get access: domain/DNS, Google Business Profile manager, Facebook/Instagram admin
- Phone: buy or port a number, register A2P 10DLC, set up call forwarding
- Import the customer list (CSV) and tag it for the reactivation campaign
- Fill in the 20 custom values and publish the workflows
- Run a live test: submit the form, miss a call, book an appointment
- Book a 30-day results review with the client

KPIs to report monthly

- **Speed to lead**: First contact within 5 minutes, and emergencies called back right away
- **Booked call rate**: Steadily increase the share of leads and calls that become booked visits
- **Visit show rate**: 90% or more of booked visits completed
- **Replacement estimate close rate**: Track monthly and improve it with consistent follow-up
- **Maintenance plan enrollments**: Grow the member count every month
- **New Google reviews**: Ask after every completed call and grow reviews every week

General guidance only. This is not legal, tax, medical or financial advice. Results depend on your offer, market and execution.