



HOME SERVICE GROWTH PLAYBOOK

A Step-by-Step System to Find Hidden Revenue,
Cut Waste, and Build Real Enterprise Value

A background image of a city skyline at night, with a large red arrow superimposed over it, pointing upwards and to the right, symbolizing growth.

BUILT FOR SERIOUS OPERATORS WHO WANT TO GROW

WELCOME THE HERO PLAYBOOK FOR RECORD SETTING GROWTH



Let's start with the truth.

If you're reading this, you've likely already built something meaningful. You've put in the years, taken the risks, hired the people, and grown your company. But you also know this: **What got you here won't get you to the next level.**

And more importantly...

You may not have full visibility into what's actually holding you back. This playbook is not fluff. It's not theory. And it's not another "marketing guide." This is an **honest self-assessment designed to expose the gaps** in your business — across your marketing, operations, leadership, and financial performance. Because at the \$5M–\$20M level:

- Growth is no longer about effort—it's about **precision**
- Marketing is no longer about leads—it's about **revenue and margin**
- And success is no longer about activity—it's about **clarity and execution**

Inside this playbook, you'll identify:

- Where your **real bottlenecks** are (not where you think they are)
- Where **money is leaking** in your marketing and operations
- Whether your current strategy can actually carry you to **8 figures and beyond**
- And what it will take to build a business with **true enterprise value**

This requires honesty. Some of the questions in this playbook will be uncomfortable. They're designed that way. Because the companies that break through to the next level are the ones willing to say:

"Here's where we're weak. Now let's fix it."

At Hero, we've used this exact framework to help generate **tens of millions in new revenue** for HVAC and plumbing companies across the country. But more importantly—we've helped owners:

- Gain clarity in their numbers
- Build scalable systems
- Strengthen their teams
- And create businesses that are **more valuable, more profitable, and less dependent on them**

If you approach this playbook seriously—not as an exercise, but as a turning point—It will show you exactly where you are...and what it will take to get where you want to go. **Let's get to work.**



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Joshua D. Cates
Author of *The Marketing Revolution*
and *Built to Scale*.

EXERCISE 1: PERSONAL AND BUSINESS SELF ANALYSIS

Step 1: Leadership & Strategic Clarity

- Do you have a clear 3-year revenue and EBITDA target? Yes ☐ No ☐ \$_____
- Do you know your current capacity vs demand (techs, trucks, install crews)? Yes ☐ No ☐
- Are you operating with a defined growth strategy or reacting month-to-month? Yes ☐ No ☐
- Who owns marketing decisions—are you still the bottleneck? Yes ☐ No ☐
- Are your goals tied to real operational constraints (labor, inventory, service mix)? Yes ☐ No ☐

Step 2: Self-Assessment Task

Let's get into our first self-assessment task.

Are you growing your top-line revenue each year?

Yes ☐ No ☐

How much market share do you currently own in your market area?

☐ 5% ☐ 10% ☐ 25% ☐ 50% ☐ 75% ☐ I don't know

If you don't know how to determine this, I would strongly suggest hiring a marketing agency to conduct a keyword research strategy and assess your current paid media advertising. If your customer isn't finding you, then it's naturally going to be hard to dominate your market.

PRO TIP: For paid media, the term you are wanting to identify is impression share. For example if there are 1,000 keyword searches in your market each month for best AC company near me and your paid media has you showing up for 100 of those, then you have a 10% impression share.

Are you using data points to drive decisions?

Here are several key areas you should be measuring. Check yes or no to do a self-assessment.

Do you know the number of calls you receive each month?

Yes ☐ No ☐

Do you know the number of website leads you receive each month?

Yes ☐ No ☐

Is your website traffic growing or shrinking?

Growing ☐ Shrinking ☐ I Don't Know ☐

Do you monitor your paid advertising efforts? And do you understand clearly what is working and not working?

Yes ☐ No ☐

Do you monitor your organic and paid ranking keywords and ranking results?

Yes ☐ No ☐

Are you A/B testing your paid ads? Meaning trying different visual and copy to determine what resonates with a potential customer.

Yes ☐ No ☐

Do you know the LTV (lifetime value) of your customer?

Yes ☐ No ☐

Finally, if you know your LTV, then do you know your Customer Acquisition Cost?

Yes ☐ No ☐

Step 3: Where are you weak?

In my book The Marketing Revolution I talk about the danger of working on your weaknesses. In the area below write down 3 areas (weaknesses) that are taking up your time. These should be 3 weaknesses you want off your plate within the next 30 days.

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Step 4: SWOT Analysis

In the area below let’s complete your SWOT Analysis by writing down 3 answers for each area. After writing them down, I would encourage you to share your answers with your team, and also ask them to perform this exercise on their own. Once you have a consensus on your SWOT, you will be well on your way to building solutions and marketing tools to leverage this simple, but impactful business exercise.

STRENGTHS

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WEAKNESSES

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OPPORTUNITIES

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THREATS

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Step 5: Start to Identify Where Change is Needed

FINANCIAL & MARKETING INTELLIGENCE

- Do you know your true Cost Per Booked Job by channel? Yes ☐ No ☐
- Do you know your Customer Acquisition Cost vs Lifetime Value? Yes ☐ No ☐
- Where is \$25K–\$100K/month potentially being wasted? _____ Don't Know ☐
- Do you have visibility into revenue by marketing channel? Yes ☐ No ☐
- Are you making budget decisions based on ROI or guesswork? Yes ☐ No ☐

MARKETING ENGINE PERFORMANCE

- Is your Google Ads account optimized around revenue—not just leads? Yes ☐ No ☐
- What % of your leads are actually booking? _____
- Are you dominating Local Pack (top 3) in your service areas? Yes ☐ No ☐
- How many branded searches are happening monthly for your company? _____
- Are you diversified or dependent on 1–2 channels? _____

WEBSITE & CONVERSION SYSTEM

- What % of your traffic converts to calls or form fills? _____ Don't Know ☐
- Is your website built for speed, mobile, and urgency? Yes ☐ No ☐
- Are your offers clear and compelling? Yes ☐ No ☐
- Do you have real tracking (calls, forms, attribution)? Yes ☐ No ☐
- Is your site built for AI visibility (schema, structured data, FAQs)? Yes ☐ No ☐

LOCAL SEO + AI VISIBILITY

- How many city/service combinations do you rank for? _____ Don't Know ☐
- Are you actively building reviews (15–30/month)? Yes ☐ No ☐
- Are you appearing in AI-generated answers (SGE, ChatGPT)? Yes ☐ No ☐
- Do you have consistent citations and brand mentions? Yes ☐ No ☐
- Are you publishing localized, high-intent content? Yes ☐ No ☐

OPERATIONS & MARKETING ALIGNMENT

- Are your call center and dispatch teams trained to convert? _____ Don't Know ☐
- What is your call-to-book rate? _____ Don't Know ☐
- Are you tracking technician close rates? Yes ☐ No ☐
- Are marketing promises aligned with actual service delivery? Yes ☐ No ☐
- Do you have rehash systems to recover lost leads? Yes ☐ No ☐

SCORING & GAP IDENTIFICATION

Score each question 1–10. Identify any category averaging below 7 as a growth constraint.

ESTABLISHING YOUR COMPANY BASELINE USING OUR 10 COMMON MARKETING MISTAKES EXERCISE

Read through our 10 common marketing mistakes and ask yourself how you rank for each one. Be honest with yourself. It’s ok if this reveals some frustration – that’s the point of going through this exercise.

1. Ignoring Target Audience:

Failing to define and understand your target audience can lead to ineffective marketing strategies. Are you creating buyer personas based on data and insights, then tailoring your marketing efforts to address their specific needs and preferences?

Rank 1 10 Importance Score 8/10

1	2	3	4	5	6	7	8	9	10
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2. Inconsistent Branding:

Do you have inconsistency in branding, including visuals and messaging which can confuse your audience? It’s critical to develop and adhere to a cohesive brand guide across all channels to build trust and recognition.

Rank 1 10 - Importance Score 6/10

1	2	3	4	5	6	7	8	9	10
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3. Overlooking Analytics:

Neglecting to analyze and interpret marketing analytics can result in missed opportunities. Are you using data analysis and tools like Google Analytics to track organic and paid ad performance, identify trends, and make data-driven decisions in your marketing? Are you looking at this data monthly?

Rank 1 10 - Importance Score 9/10

1	2	3	4	5	6	7	8	9	10
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4. Neglecting Mobile Optimization:

With the rise of mobile usage, not optimizing your website and CTAs for mobile devices can lead to a significant loss of potential customers. Is your website mobile friendly and easy to navigate / schedule an appointment? Are you tracking these metrics anywhere? Do you own your website, or lease your website?

Rank 1 10 - Importance Score 8/10

1	2	3	4	5	6	7	8	9	10
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5. Ignoring Social Media Engagement:

Simply broadcasting messages on social media without engaging with your audience can be detrimental. Are you actively participating in conversations, responding to comments, and building relationships on social platforms?

Rank 1 10 - Importance Score 6/10

1	2	3	4	5	6	7	8	9	10
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6. Relying Solely on One Marketing Channel:

Putting all your marketing efforts into one channel can leave you vulnerable to changes in the market. How are you doing on diversifying your marketing mix to reach a broader audience and reduce risk? Follow the 75/15/10 rule discussed in my book The Marketing Revolution.

Rank 1 10 - Importance Score 6/10

1	2	3	4	5	6	7	8	9	10
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7. Ignoring Customer Feedback:

Customer feedback is valuable for improving products and services. Ignoring or dismissing customer feedback can result in a negative reputation. Do you have an active strategy for Google review and reputation management?

Rank 1 10 - Importance Score 9/10

1	2	3	4	5	6	7	8	9	10
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8. Focusing Too Much on Features, Not Benefits

Highlighting product features without explaining the benefits to the customer may not resonate. Are you clearly communicating how your product and services solves the customer’s problems or fulfills their needs?

Rank 1 10 - Importance Score 7/10

1	2	3	4	5	6	7	8	9	10
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9. Neglecting Content Quality:

Poor-quality content can harm your brand image. Are you investing in creating high-quality, relevant content (like blogs on your website, posts on Google and email newsletters) that add value to your audience and positions your HVAC business as an authority in your industry and market?

Rank 1 10 - Importance Score 9/10

1	2	3	4	5	6	7	8	9	10
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10. Lack of a Clear Call to Action (CTA):

If your marketing materials lack a clear CTA, potential customers may be unsure about the next steps. Are you clearly stating what you want your audience to do, whether it's making a purchase, signing up, or booking an appointment?

Rank 1 10 - Importance Score 8/10

1	2	3	4	5	6	7	8	9	10
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Congratulations you are done with this exercise!

Now, let's proceed with creating a scoring system for the 10 questions and their answers using a 1-10 ranking score. The importance score of each question reflects the significance or relevance of the question within the context it's being asked.

(Q score) represents the score assigned to the answer of a particular question using 1-10.

(Importance score of Q) represents the importance or weight of that question.

X represents the resulting score when you multiply the score of the answer by the importance of the question.

Calculate using this formula: (Q score) __ x (Importance score of Q) __ = X

As a reminder your importance score for the 10 questions are as follows: 8, 6, 9, 8, 6, 6, 9, 7, 9, 8.

To receive your final analysis and free marketing audit report, please share your results by email to josh@marketlikeahero.com

ACTION PLAN FOR IMPROVEMENT

Using the Answers Above, Write Down Your Top Priority Areas for Improvement:

Action 1: Top Priority

Steps to Improve:

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Action 2: What is Your Timeline to Improve These Areas

Steps to Improve:

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Action 3: Are You Able to Remedy These Areas for Improvement, or Will You Need Outside Help

Steps to Improve:

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Based on Question 1 from Section 2, Do You Know What Keywords You re Ranking for and Your Keyword Ranking:

Yes ☐ No ☐

Additional Notes and Recommendations:

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SECTION 4: KEYWORD RANKING REPORT AND FULL WEBSITE AUDIT

NOTE: This information will be provided by Hero Marketing Agency at the completion of your website audit and local market keyword ranking report. Our team will review this information with your HVAC business, so all parties are clear on the baseline report, and goals with your new marketing plan.

THE FINAL EXERCISE WE WILL GO THROUGH INVOLVES MEASURING YOUR KPI's (KEY PERFORMANCE INDICATORS) AND HOW THEY IMPACT YOUR COMPANY AND MARKETING STRATEGY.

What are you measuring and what do you need to improve on?

Revenue Growth: Are you measuring the increase in overall revenue over a specific time period?

Yes ☐ No ☐

Profit Margin: Do you know the percentage of profit your company makes from its revenue?

Yes ☐ No ☐

Customer Satisfaction: Do you have satisfied customers and are they leaving consistent positive reviews for your business on Google?

Yes ☐ No ☐

Customer Acquisition Cost (CAC): Do you know the cost of acquiring a new customer?

Yes ☐ No ☐

Customer Lifetime Value (CLV): Do you know the total value a customer brings to your company over their entire relationship?

Yes ☐ No ☐

Churn Rate: Are you able to identify the number of customers who stop using your product or service over a given period?

Yes ☐ No ☐

Net Promoter Score (NPS): Do you know your customer loyalty and satisfaction based on the likelihood of customers recommending your company?

Yes ☐ No ☐

Employee Satisfaction/Engagement: Assesses the satisfaction and engagement levels of employees.

Great ☐ Good ☐ Bad ☐ Don't Know ☐

Cost of Goods Sold (COGS): Do you know the direct costs of goods for your services?

Yes ☐ No ☐

Return on Investment (ROI): Do you know the ROI on your organic and paid marketing efforts?

Yes ☐ No ☐

Market Share: Do you know your current percentage of market share you're your company controls?

Yes ☐ No ☐

Conversion Rate: Do you know the percentage of visitors who take a desired action, such as making a purchase, or using your contact form, and how many you are converting online with your website, Google Business Profile page, and also with your paid marketing efforts?

Yes ☐ No ☐

Quality Metrics: Have you had an audit of the quality of products or services and how they compare to the competition?

Yes ☐ No ☐

Brand Awareness: Do you know how well your brand is recognized and remembered by the target audience?

Yes ☐ No ☐



BOOM! YOU ARE DONE!

PUTTING THIS ALL TOGETHER: MARKETING PLAN IMPLEMENTATION STEPS

Implementing the results and data from your HVAC & Plumbing Growth Playbook is the crucial step where we bring your well-crafted strategies and tactics into action using the information you've learned through this Playbook. This is the phase where our marketing team and your in-house team execute your marketing activities to reach your target audience and achieve your growth objectives.

Remember: I cover this step in great detail throughout chapter 6 of The Marketing Revolution.

Execute Your Tactics: We first start by executing the specific tactics outlined in your playbook. This may involve launching advertising campaigns, creating content, implementing SEO strategies, optimizing your Google Business Profile, creating a review management strategy, engaging in social media activities, or conducting email marketing, among other tactics. Each tactic should align with your overall marketing strategies and target the identified audience segments.

Assign Responsibilities: Clearly define roles and responsibilities for each marketing activity (both external with Hero Marketing, and internal with your team) to ensure smooth execution and accountability. Having a well-organized structure and clear communication channels will help keep everyone accountable and ensure that tasks are completed in a timely manner.

Set Timelines and Milestones: Establish timelines and milestones for each marketing activity to keep the implementation on track. This step is critical for accountability to monitor progress, identify any potential delays or issues, and make adjustments as needed. Breaking down your marketing plan into smaller, manageable tasks with specific deadlines will enhance efficiency and productivity. Please note: Our agency keeps track of all steps using our Asana task management software system, and you will be in continual communication with our Client Strategist to ensure success on all fronts.

Monitor and Track Performance: Continuously monitor and track the performance of your marketing activities. Utilize key performance indicators (KPIs) relevant to each tactic and align them with your marketing objectives. This will enable you to evaluate the effectiveness of your strategies, identify areas of improvement, and make data-driven decisions.

Accountability: Attend your monthly strategy Zoom calls with Hero Marketing to review data and make adjustments as necessary. By consistently evaluating the outcomes of your marketing efforts, we will make necessary modifications to optimize results.

Adapt and Adjust: As we implement your marketing plan, be open to adjustments and adaptations based on the insights and feedback you receive, and what the data is telling us. Market dynamics and customer preferences may change, so we will be prepared to refine your strategies and tactics accordingly.

Measure Return on Investment (ROI): Our team will assess the return on investment of your marketing activities by analyzing the impact they have on your business goals. We will track and share metrics such as sales revenue, customer acquisition cost, new jobs booked, source of new leads, website traffic, engagement rates, and conversion rates to name a few. This will help you gauge the effectiveness of your marketing efforts and allocate resources to the most profitable activities.

Communication and Collaboration: Foster effective communication and collaboration with our marketing agency and across other departments. Regularly share progress updates, insights, and results to keep everyone informed and aligned with the overall marketing objectives. Encourage open communication channels for feedback, ideas, and suggestions to continuously improve your marketing implementation.

Adapt to Feedback: Actively seek feedback from customers, target audience, and internal stakeholders. Analyze their responses and adjust your marketing tactics accordingly. Pay attention to customer preferences, market trends, and industry insights to stay relevant and responsive to changing needs.



CONGRATULATIONS – YOU MADE IT.

Completing this playbook puts you ahead of most business owners because you took the time to evaluate what's working, identify what's leaking, and map out where your next opportunities are.

Clarity creates momentum. And momentum creates growth.

What you've outlined in these pages can become the foundation for stronger operations, better marketing performance, higher conversion rates, and more profitable decision-making.

SEE WHAT THIS LOOKS LIKE IN ACTION

Hear directly from business owners who have implemented these strategies and transformed their companies.



▶ CLICK IMAGE TO PLAY TESTIMONIAL



▶ CLICK IMAGE TO PLAY TESTIMONIAL

WANT A SECOND SET OF EYES ON YOUR RESULTS?

If you'd like a complimentary analysis of your completed playbook, send it over.

We'll review it, identify blind spots, point out opportunities, and give you actionable feedback you can apply immediately.

Send your completed playbook with results to: josh@marketlikeahero.com 📧🔔



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