HVAC buyer’s first-90-days operating plan

Use the first quarter to protect service continuity and establish a trustworthy operating baseline before changing price books or incentives.

How to use this file

1. Choose one operating lead and give each weekly measure a system of record.
2. Hold short meetings with dispatch, installation, service and finance separately.
3. Compare actual results to your underwriting case and record the cause of each variance.

Shop or transaction _____

Prepared by _____

Period and cutoff date _____

> Educational planning template. Verify your figures and assumptions with your transaction advisors.

Days one through seven

□ Test access to scheduling, inbound calls, payroll, billing and purchasing with the responsible employee present.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Review tomorrow’s calls, parts holds, callbacks and emergency coverage with the dispatcher.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Check bank balances, upcoming payroll, outstanding deposits and the cash needed to finish sold installations.

Owner and target date _____

Evidence or exception _____

Next action _____

Days eight through 30

□ Ride along with service and installation teams. Ask where approvals, parts or documentation delay completion.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Review member renewals using the eligible cohort and separate cancellations from payment failures.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Rebuild your weekly booked-call and sold-job report from actual dispatch and invoice records.

Owner and target date _____

Evidence or exception _____

Next action _____

Days 31 through 90

□ Tie weekly cash forecasts to actual receipts and vendor terms, then revisit the line-of-credit cushion.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Review callbacks, warranty labor and gross margin alongside average ticket before changing incentives.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Choose one operating improvement, document the baseline and recheck after a complete work cycle.

Owner and target date _____

Evidence or exception _____

Next action _____