The HVAC Busy Season Playbook

Maximize revenue, minimize burnout

Hatch | NEXSTAR network

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Customer communication platform enabling you to scale revenue-driving conversations across SMS, email, and live call.

→ Higher conversion
→ Lower overhead
→ Scalable growth

Member-owned organization that drives business growth and development through continued education and the sharing of ideas.

→ 40+ coaches
→ 800+ members; 95% retention rate
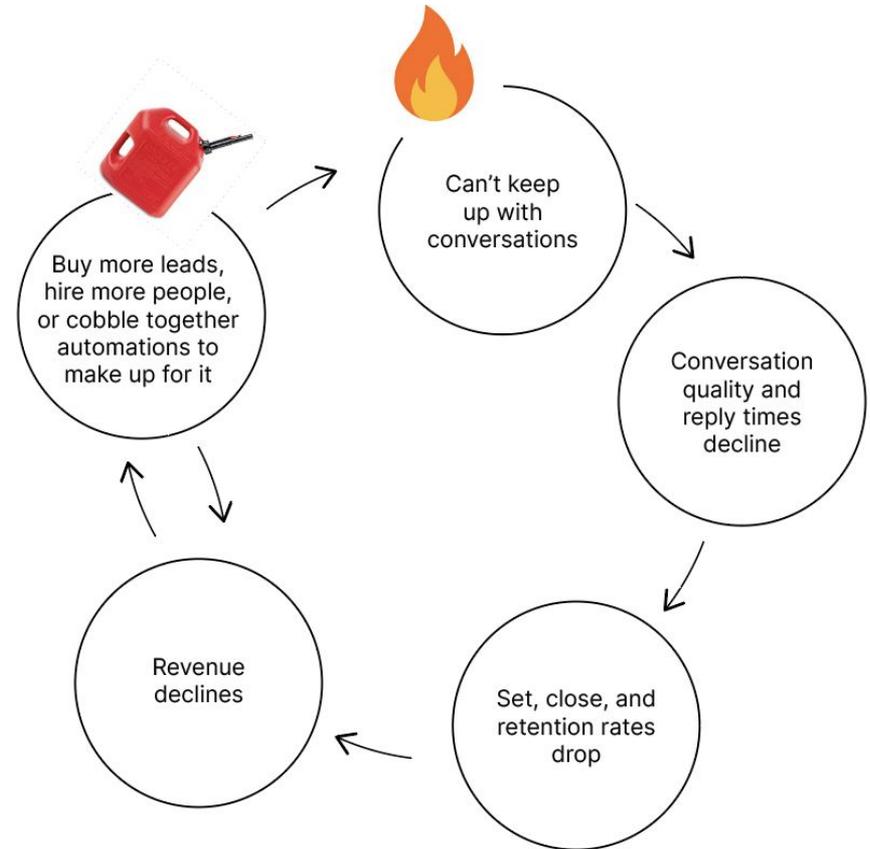→ 10% revenue growth and 15% net profit

Agenda

→ Expansion trap
→ Map out touchpoints
→ Pair with best practice communication
    → Speed to lead best practices
    → Estimate follow-up best practices
→ Prepare for the long game
    → Lead nurture best practices
→ Mindset
→ Bring it all together
→ Q&A

Share your comments and questions throughout!

The problem with busy season

- Volume without strategy = missed opportunities and a burnt out team
- What are the best in class businesses doing to fully capitalize on busy season?

What it comes down to = conversations

Buy more leads, hire more people, or cobble together automations to make up for it

Can't keep up with conversations

Conversation quality and reply times decline

Set, close, and retention rates drop

Revenue declines

1. Map out your touchpoints

- Pretty straightforward but the point is, map it
- Each point = an opportunity or a leak

- This is a distilled version - focused on busy season touchpoints, we'll cover off-season touchpoints later
- Template here

Touchpoint	Goal
Filled out form	Book appointment
Called your business	Book appointment
Booked estimate appt	Keep appointment
Did not book estimate appt	Book appointment
Canceled estimate appt	Book appointment
Accepted estimate	Learn what to expect
Open estimate	Answer questions, raise objections, close it
Upcoming install	Remind them, answer questions
Completed install	Follow up
Invoice due	Pay invoice

2. Pair with best practice outreach

The rules of outreach:
- Prompt
- Personalized (catered to that touchpoint)
- Short, response-oriented
- Multi channel (SMS (primary), email, call)
- Multi-day (sequence)
- Messaging best practice guide

Mindset: Pushing through the funnel vs guiding them in buying
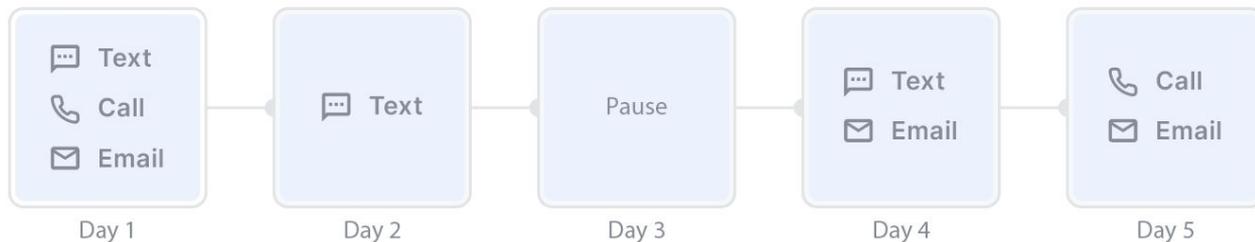
2. Pair with best practice outreach

- Notice, the best practices we shared are just for outreach
  - Goal is to get a response, not an appointment
  - Small actions, lower friction
- Every touchpoint is a conversation
  - Start the conversation to prompt the ultimate action
- Basic formula, varies by touchpoint
  - So what does this look for key touch points during busy season?
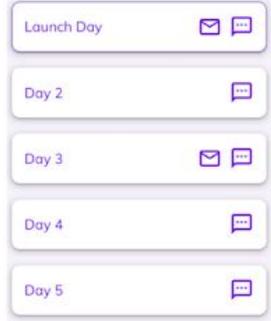   - Speed to lead
    - Estimate follow up

Response rate first.
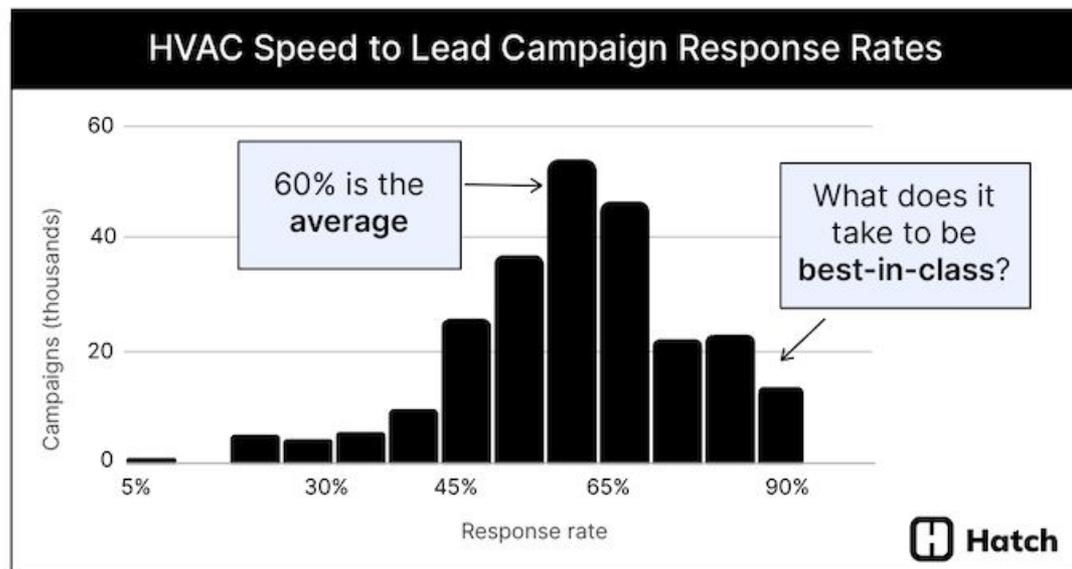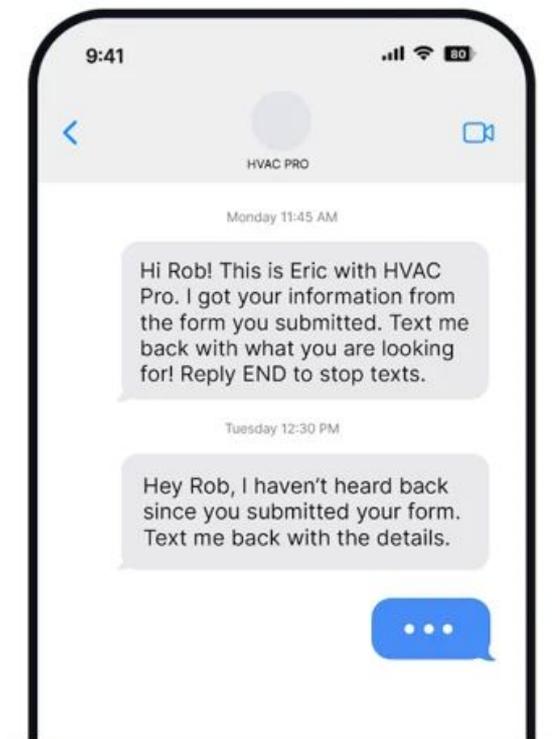**Everything else will follow!**

Speed to lead best practices

What gets the response? We did a study.

1. <1 minute outreach
2. 7 message, 5 days
3. 160-250 characters (includes compliance verbiage)
4. End with a clear ask that requires a simple answer. Don't put any work on their plate.
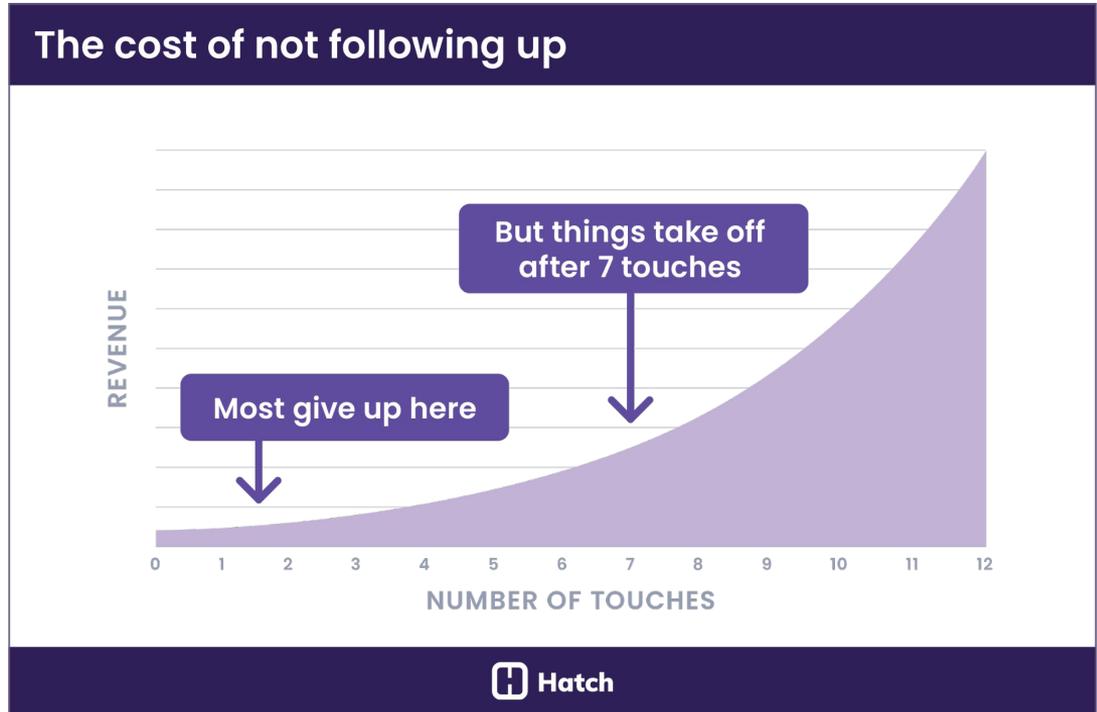
- Data study here
- Example templates here

HVAC Speed to Lead Campaign Analysis		
	Best performing	**Worst performing**
Response rate	89.86%	8.56%
# of messages	7 messages, 5 days	1 message
Channel breakdown	5 texts, 2 emails	1 text
	Launch Day Day 2 Day 3 Day 4 Day 5	Launch Day
First text length	241 characters	634 characters
First email length	204 characters	n/a

Speed to lead best practices

Estimate follow-up best practices

● First of all, do it!!!

The cost of not following up

But things take off after 7 touches

Most give up here

REVENUE

NUMBER OF TOUCHES
0 1 2 3 4 5 6 7 8 9 10 11 12

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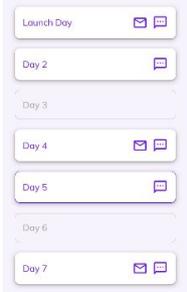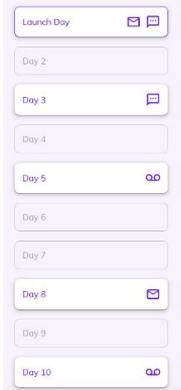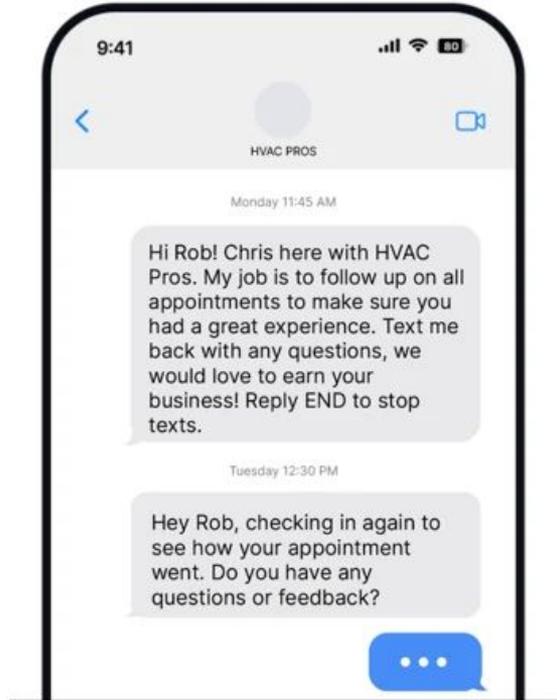
Estimate follow-up best practices

- Reach out within 1-2 days
- 7 messages, 7 days, 2 pause days
    - 5 texts and 2 emails
- 160-220 characters
- That doesn't mean that other cadences won't work. Just make sure you stick to messaging best practices
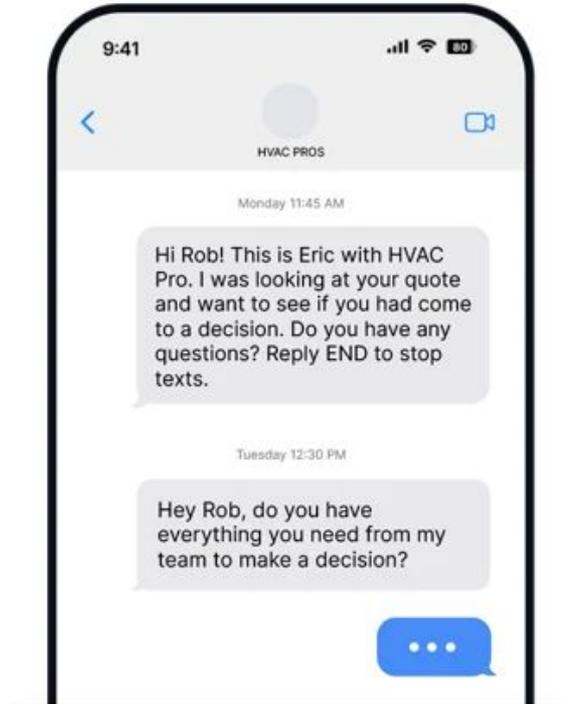
- Data study here
- Example templates here

HVAC Estimate Follow-Up Campaign Analysis

	Best performing	Worst performing
Response rate	90.60%	17.82%
# of messages	7 messages	6 messages
Duration	• 7 days • 5 message days, 2 pause days	• 10 days • 5 message days, 5 pause days
Channel breakdown	5 texts, 2 emails	2 texts, 2 emails, 2 voicemails
First text length	200 characters	434 characters
First email length	134 characters	484 characters

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Estimate follow-up best practices

Feedback approach

9:41

HVAC PROS

Monday 11:45 AM

Hi Rob! Chris here with HVAC Pros. My job is to follow up on all appointments to make sure you had a great experience. Text me back with any questions, we would love to earn your business! Reply END to stop texts.

Tuesday 12:30 PM

Hey Rob, checking in again to see how your appointment went. Do you have any questions or feedback?

Direct quote approach

9:41

HVAC PROS

Monday 11:45 AM

Hi Rob! This is Eric with HVAC Pro. I was looking at your quote and want to see if you had come to a decision. Do you have any questions? Reply END to stop texts.

Tuesday 12:30 PM

Hey Rob, do you have everything you need from my team to make a decision?

Go for the long game

Have long-term nurture sequences in place for leads and customers you engaged during busy season (for 3-6 months down the line)

1. Aged leads that never booked
2. Aged estimates that never closed
3. Half completed jobs
4. Maintenance & memberships
5. Cross promotion

Example templates here

TEMPLATE #1: OPEN ESTIMATE

Launch Day - Text 1:45pm	Hi [Contact First Name], it's [User First Name] with [Details Company Name]. We never got the opportunity to discuss your estimate. Are you still looking to get this project done? Reply END to stop texts.
Launch Day - Email 2:30pm	Subject line: [Contact First Name], still looking to complete your project? Hi [Contact First Name], I hope you're doing well! We never got the opportunity to finalize your estimate. Could you let us know your current thoughts on it? Looking forward to hearing from you, [User First Name] [User Last Name] [Details Company Name]
Day 2	Skip
Day 3 - Text 2:00pm	Just checking in to see if you received my last message. When would be a good time for you to discuss the estimate we provided?
Day 4	Skip
Day 5	Skip
Day 6 - Text 1:15pm	I would love the opportunity to review the estimate we provided with you. Do you have time this week to discuss it?
Day 8 - Text 11:00am	Hey [[Contact First Name]], before I close this out, is this project something you'd like to revisit in the future?

Go for the long game

That means you need to:

1. Properly disposition CRM
2. Make sure techs are promoting maintenance program during the install
3. Make sure you're providing a great in-person experience for that repeat business

Wrap it up

1. Map out the customer journey touchpoints
2. Pair with best practice communication
3. Prioritize the in-season ones but prepare for off-season
4. Use automation to help you do it
5. Have the right mindset - guiding through journey, not pushing through funnel

Q&A

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Appendix

Use automation!

- Best practice communication across every key touchpoint is a lot to manage!

Speed to lead

- Importance of speed!
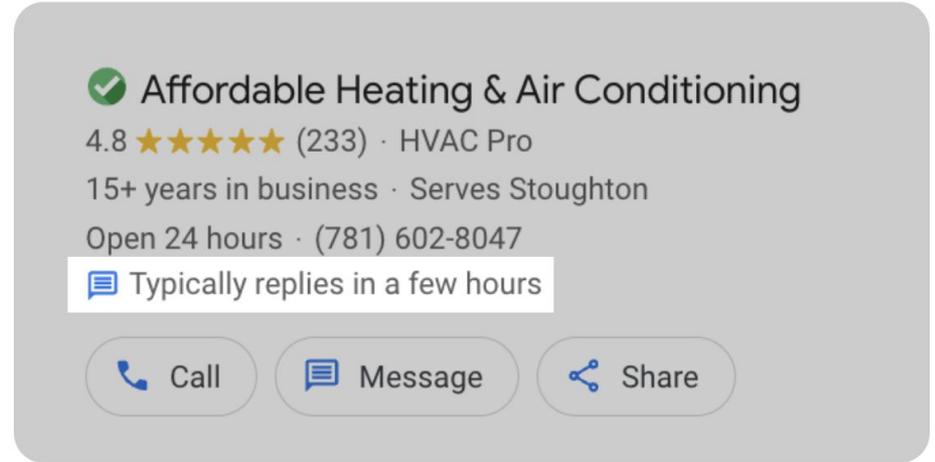
Affordable Heating & Air Conditioning
4.8 ★★★★★ (233) · HVAC Pro
15+ years in business · Serves Stoughton
Open 24 hours · (781) 602-8047
Typically replies in a few hours

Call   Message   Share

8x conversion in
first 5 min

78% go with the first
business they hear from

Customer journey

- Importance of a full-funnel approach

Speed to lead
Instant form fill response + missed call follow-up

Aged lead & canceled appointment follow-up

Estimate follow-up
Recent and aged

Customer care
Appt confirmations, updates, reviews, feedback, referrals

Cross/upsell

Memberships & recurring services
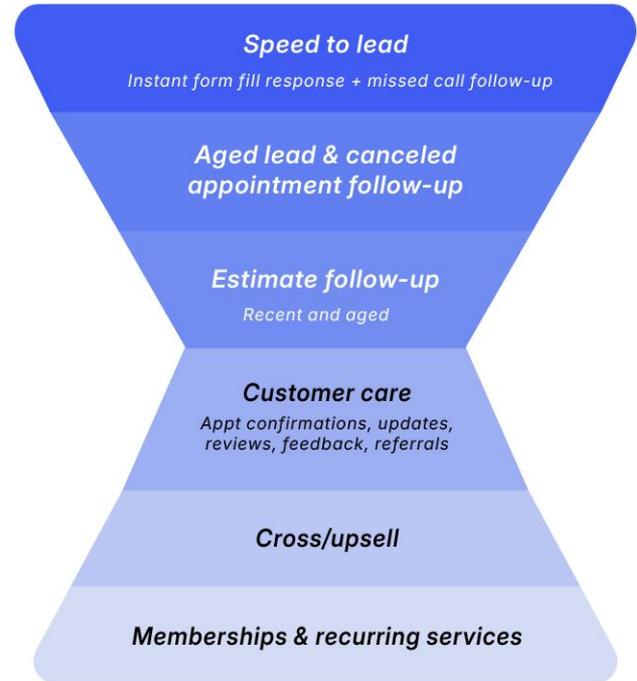
Nexstar <> Hatch success stories

- [Wilson](#)
  4x set rate; 2x revenue
- [Peterman](#)
- [Apex](#)
  5x set rate, +20% revenue
- [Peaden](#)
  86% connect rates
- [Apple Aire](#)

- [Point Loma](#)
  +14% set rate
- [Rescue Air](#)
  +10% close rate
- [GL Hunt](#)
  +40% set rate
- [Genz-Ryan](#)
  700 tune-up appointments with one campaign

- Watch a demo video **here**
- View all success stories **here**.