

HVAC Business Health Scorecard

Eight questions about how you price, cost, and market your HVAC business. One honest score, and the three things to fix first.

FREE TOOL

HVAC

PRINT OR FILL ON SCREEN

BUILT BY FERVOR STUDIO

HOW TO SCORE IT

8 checks, one honest number

Score each check from 0 to 13. Give the full 13 when it is clearly true, a zero when it is not, and something in between when it is close. Add the eight scores together. The closer your total runs to 100, the healthier the business, and the band below reads your number so you can fix your lowest-scoring area first.

YOUR SCORECARD

Score each check out of 13

Q1 You price every job to a target margin rather than by gut or by matching a competitor.

Q2 You know your true cost per billable hour, with payroll burden and non-billable time already in it.

Q3 You track gross margin on jobs, so you can see which work makes money and which does not.

Q4 You forecast cash flow far enough ahead to see a slow month before it arrives.

Q5 You track where leads come from and what each channel costs you per booked job.

Q6 You review a short set of business numbers on a regular schedule, not once a year at tax time.

Q7 You have some recurring or repeat revenue, so the month does not start at zero every time.

Q8 You have raised your prices in the last twelve months to keep pace with your costs.

Your total out of 100

WHAT YOUR SCORE MEANS

Read your band

90 to 100 · A · Honors	The business earns trust on its own. Keep the discipline that got you here.
80 to 89 · B · Passing	Solid work, but you are leaving points, and money, on the table.
70 to 79 · C · Conditional	You passed, barely. A few gaps are quietly costing you jobs.
60 to 69 · D · Probation	The fundamentals need attention before growth is safe.
0 to 59 · F · Condemned	Start with the lowest-scoring area first. That is where the return is.

Bands use American school grading. An A does not start until 90, so most sites and most books land in the B to D range, which is exactly where the fixable money is.

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