HVAC BUSINESS RESOURCES

HVAC marketing plan worksheet

01 / Campaign scope and operating capacity

Business / planning period / campaign owner / review date

1. Service

Service to promote / service territory / included scope

2. Audience

Customer segment / buying situation / qualification criteria

3. Offer

Offer / proof / appointment action / terms

4. Capacity

Available estimate slots / service capacity / supplier constraints

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HVAC marketing plan worksheet

5. Channel

Website / local search / ads / referrals / email / social / partners / seasonal campaign

6. Responsibility

Inquiry owner / response process / estimate follow-up / delivery owner

7. Success measure

Qualified inquiries / bookings / approvals / completed jobs / contribution

Period / channel	Spend	Booked jobs	Cost per booked job

Cost per booked job = campaign spend / jobs booked from that campaign. Use one attribution method consistently.