HVAC BUSINESS RESOURCES

HVAC business startup checklist

01 / Launch readiness | Owner: _____ | Review date: _____

1. Choose HVAC services and a service area

☐ Service list, customer segment, territory and exclusions recorded.

Services / territory / decision owner | Due date / completion

2. Get the licenses needed to start an HVAC business

☐ Required licenses, EPA credentials and permit authorities verified for the work.

Authority / requirement / status / renewal date | Due date / completion

3. Write the HVAC business plan

☐ Operating plan, customer assumptions and funding objective documented.

Plan version / evidence still needed | Due date / completion

4. Estimate HVAC business startup costs and secure funding

☐ Setup purchases, working capital, funding and cash timing recorded.

Budget / funding source / reserve | Due date / completion

5. Register the business and set up banking

☐ Entity, registrations, tax accounts and business banking established.

Registration references / bank setup status | Due date / completion

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02 / Launch readiness | Owner: _____ | Review date: _____

6. Arrange insurance and safe working procedures

☐ Insurance scope and equipment-specific safe-work procedures documented.

Policy / limit / procedure / training record | Due date / completion

7. Buy essential tools and choose suppliers

☐ Tools, ratings, calibration, suppliers and replenishment needs recorded.

Inventory / supplier / outstanding order | Due date / completion

8. Set profitable HVAC service prices

☐ Labor, materials, overhead, selling price and margin calculated.

Price book version / review date | Due date / completion

9. Set up customer records, scheduling and invoicing

☐ Customer, estimate, schedule, invoice and payment workflow configured.

Workflow owner / test job result | Due date / completion

10. Find the first customers and launch

☐ Website, local profile, referrals and lead follow-up assigned.

Launch date / lead owner / first-week review | Due date / completion

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