

HVAC Revenue Floor Scorecard

Feast-or-Famine Leak Report (Prep Worksheet)

AutoBoss — HVAC Revenue Infrastructure

1. Business snapshot

Company name: _____

Service area: _____

Dispatch / CRM: _____

2. Feast-or-famine pattern

Highest revenue month last year (\$): _____

Lowest revenue month last year (\$): _____

Peak-to-slow ratio (high / low): _____

If ratio > 2.5x, prioritize leaks before more ads.

3. Lead response (Pillar 2)

Typical peak-month inbound leads: _____

Typical slow-month inbound leads: _____

First contact usually within ____ minutes

Missed calls get automatic text-back? Y / N

4. Estimates (Pillar 3)

Open estimates in CRM right now: _____

Follow-up cadence after quote sent: _____

Estimate follow-up rate (rough): _____

5. Memberships (Pillars 4-5)

Active maintenance members: _____

Members / completed jobs (90 days) = attach % ____

Renewals in next 45 days with no outreach: ____

6. Past customers (Pillar 6)

Active + past customer contacts in CRM: _____

Last reactivation campaign date: _____

Reactivation in last 12 months? Y / N

7. Proof (Reputation)

Google review count: _____

Google rating: _____

Systematic review request after jobs? Y / N

8. Score yourself (0-2 each, max 20)

CRM data trustworthy enough to pull lists: ____

Speed-to-lead under 5 minutes: _____

Estimate follow-up 3+ touches: _____

Membership attach consistent: _____

Renewals scheduled proactively: _____

Past customers reactivated yearly: _____

Reviews requested systematically: _____

Slow months planned (not reactive): _____

CRM confidence (1-5): _____

TOTAL (0-20): _____

What to fix first (circle one):

- ☐ Missed calls / speed-to-lead
- ☐ Dead estimates
- ☐ Weak memberships
- ☐ Dormant CRM / reactivation
- ☐ CRM data / reporting

Bring this worksheet to your Revenue Leak Audit. Book at your AutoBoss audit link.