THE AC AND HVAC PLAYBOOK

Five plays for AC companies: who to call, what to offer, the words to use and what to measure.

HOW TO RUN THIS PLAYBOOK

Pick one play and run it for a full month before you add another. Start with the play that matches your calendar. Assign one owner, one list and one script, and write down how many dials your office can realistically make each week. Review the numbers every Friday: dials, conversations, booked visits, show rate and sold work. Keep your techs informed about what the office is offering, so that nobody is surprised at the door.

Outbound calls and texts must follow the calling rules, including consent, do-not-call lists and opt-outs. Read the calling rules guide and check with your attorney. These plays are general guidance.

PRE-SEASON TUNE-UP PUSH

Fill the soft weeks before the first hot or cold spell. Your techs do better work when they aren't racing the weather.

WHEN TO RUN IT

Start four to six weeks before your soft weeks end.

WHO TO PULL

Customers with no visit in 12 months, and every plan member due for a visit.

THE OFFER

A tune-up or a no-charge safety check. Pick one and put real volume behind it.

The words

> Hi [Name], this is [Your name] with [Company]. We took care of your [system] at [address] back in [month, year], so I wanted to call you before the [heat/cold] gets here.
> We're setting up [tune-ups / safety checks] on your street next week. A tech looks over the system so you aren't calling us on the hottest day of the year.
> I have [day] morning or [day] afternoon. Which works better?
> [Book it.] Let me read that back: [date], [window], at [address], and the best number is [number]. You'll get a text when the tech is on the way.

Follow-up

Call twice and text once over ten days, then move them to next season. Send plan members a reminder a week ahead.

Measure

Conversations, booked visits, show rate, and repair or replacement work that came from those visits.

Watch out for

Booking more than your techs can run. Cluster by zip code and size each day to the techs actually on the board.

AGING-SYSTEM OUTREACH

Reach owners of older equipment before the failure, when they can decide calmly and you aren't competing with three other quotes.

WHEN TO RUN IT

Shoulder months, once tune-ups are underway.

WHO TO PULL

Systems 7 years and older, oldest first. Add units your techs noted as worn or leaking.

THE OFFER

A no-charge system evaluation with a written findings sheet.

The words

> Hi [Name], it's [Your name] at [Company]. Our records show the [system] at [address] was put in around [year].
> Systems that age can start costing more to run, and the worst time to find out is a breakdown in [July/January]. We'd like to have someone look it over and give you a straight answer on how it's holding up, at no charge.
> There's no pressure to replace anything. If it's fine, we'll tell you that.
> Does [day] morning or [day] afternoon work?

Follow-up

Findings go out in writing the same day. If they don't buy, follow the unsold estimate play below.

Measure

Evaluations booked, shown, sold, and average sale.

Watch out for

Rebates and credits change. The federal 25C and 25D credits ended for work after 2025, so check what's changing before anyone quotes savings. Have a clear answer on refrigerant too: see the refrigerant conversation.

MAINTENANCE PLAN RESCUE

A lapsed plan is a customer who already said yes once. Win them back before someone else does.

WHEN TO RUN IT

Every month. Call 60 days before a plan expires and again after it lapses.

WHO TO PULL

Plans expiring in 60 days, and plans lapsed in the past 18 months.

THE OFFER

Renew at the current rate and schedule the next visit on the same call.

The words

> Hi [Name], it's [Your name] at [Company]. Your maintenance plan on [address] comes up on [date], and I wanted to get your next visit on the calendar so nothing gets missed.
> It covers [two visits a year, priority scheduling, member pricing]. Last year your tech [what was done].
> I can renew it now and set your visit for [day] or [day]. Which is better?

Follow-up

If they hesitate, ask what would make it worth keeping. Log the reason. Offer a single tune-up rather than losing them.

Measure

Renewal rate, lapsed plans won back, visits completed per plan.

Watch out for

Selling plans at renewal, then missing the visits. A plan with no completed visits becomes a cancellation next year.

UNSOLD REPLACEMENT ESTIMATES

Estimates you already paid to create. Many homeowners just stopped deciding.

WHEN TO RUN IT

At 2 days, 30 days, 90 days and 180 days after the estimate.

WHO TO PULL

Every open replacement estimate from the past 12 months.

THE OFFER

A second look at options, or a revised option that fits their budget.

The words

> Hi [Name], it's [Your name] at [Company]. [Advisor] was out on [date] and left you some options for the system at [address].
> I'm not calling to push you. I wanted to see if you had questions, or if something has changed.
> How is the system doing? ... Would it help to have [Advisor] walk through the options again, or look at a different one?

Follow-up

Note the reason every time. When they say no, ask if you can check back before next season. Honor it if they say stop.

Measure

Follow-up completion rate, estimates recovered, and days from estimate to sale.

Watch out for

Inventing urgency. A price that really expires can be stated. A fake deadline costs you the customer.

HEAT WAVE AND COLD SNAP DAY PLAN

On the worst days, the plan decides who gets served and who feels ignored.

WHEN TO RUN IT

Decide before the season. Activate when the forecast turns.

WHO TO PULL

Everyone calling in, plus scheduled maintenance that may need to move.

THE OFFER

An honest window, a clear place in line, and a call if anything changes.

The words

> Thanks for calling [Company]. I'm sorry you're dealing with this, and I'll take care of you.
> Is anyone in the home elderly, an infant, or medically at risk? ...
> We're running heavy today. The earliest I can promise is [window]. I'd rather give you a time we'll keep. If something opens up sooner, I'll call you. Can I get you on the schedule?

Follow-up

Call every waiting customer when the window moves. Re-book moved maintenance the same day.

Measure

Answer rate during the surge, abandoned calls, windows kept.

Watch out for

Promising same-day to everyone. Use the surge plan template and agree on the priority rules ahead of time.

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