HVAC BUSINESS PLAYBOOK

STRATEGIES • SYSTEMS • MORE DEALS

5 CLOSING TIPS INSIDE

More HVAC replacement leads.

And how to close the quotes you already gave.

More leads.
Bigger tickets.
Higher profits.



ATTRACT
REPLACEMENT LEADS

Get in front of homeowners ready to upgrade.

FOLLOW UP
WITH CONFIDENCE

Turn more quotes into yes.

CLOSE
MORE JOBS

Win bigger deals and grow faster.

A MORE PROFITABLE HVAC BUSINESS STARTS HERE

START HERE

Your best replacement leads are already in your files.

Old systems, open quotes, repair customers on their third call. Most shops chase new replacement shoppers with ads and never work the list they already have. Do both, in this order: the list first, then ads, then follow-up that closes what you quoted.

10 / 15 ENERGY STAR suggests homeowners consider replacing a heat pump or AC that's more than 10 years old, or a furnace or boiler that's more than 15. Every one of those in your customer list is a conversation worth having.

LEAK 1

Nobody mentions it

The tech fixes a 16-year-old system and leaves without a word about what's coming.

LEAK 2

One big number

A single price turns the visit into yes or no, and no is easier.

LEAK 3

No follow-up

The quote sits in an inbox. The homeowner buys from whoever called back.

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Four lists to pull today, and the texts.

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Five numbers to watch every Monday.

Source: ENERGY STAR, "When is it time to replace?" (energystar.gov).

01 · MINE YOUR LIST

Four lists to pull from your software today.

Each list is a group of homeowners who are already closer to a new system than any stranger clicking an ad. Pull them, then text them in the calm months when they can decide without the house being too hot or too cold.

LIST	HOW TO PULL IT	SEND
A. Old systems	Install dates or equipment notes: AC or heat pump 12+ years, furnace 15+ years.	Text A
B. Repeat repairs	Two or more repair visits in the last 18 months.	Text B
C. Tech flagged it	Job notes with "recommend replacement", "end of life", "rust", "cracked".	Office call, then text B
D. Open quotes	Every replacement quote from the last 12 months that didn't close.	Text C, then page 8

TEXT A · OLD SYSTEM

Hi {First name}, it's {Your company}. Your {AC / furnace} is {age}+ years old. If you'd like to see replacement options before it quits, we can walk you through them, no pressure. Want a visit?

TEXT B · REPEAT REPAIRS

Hi {First name}, {Tech name} from {Your company}. You've had a few repairs on your system lately. Want us to lay out the numbers on repair vs. replace, so you can decide on your own time?

TEXT C · OPEN QUOTE

Hi {First name}, {Your name} at {Your company}. Checking in on the system we quoted last {season}. It's our quieter time of year, so installs can be scheduled on your timeline. Any questions?

ORDER MATTERS

Start with list D, open quotes: those homeowners already said they're thinking about it. Then C, B and A. Send in waves of 25 to 50 so someone can call back every reply the same day.

What to send with the reply

- ✓ Two open times for an options visit this week.
- ✓ A link to your replacement page with photos of your installs.
- ✓ Your Google rating and a couple of your reviews.

Only text customers who gave you their number, and stop when anyone asks you to.

Techs don't need to sell. They need to say what they see.

Homeowners trust the tech in their house more than any ad. The goal is not a pitch; it's a clear, honest picture and an easy next step. Here's the talk, in order.

1. REPORT WHAT YOU FOUND
"Here's what I found today: {the problem}. I can fix it for {$repair}. I took a couple of photos so you can see it."

2. PUT THE AGE IN CONTEXT
"Your system is {age} years old. At that age it's common to see more repairs coming, like {likely next issue}. It's not an emergency today; it's just good to know."

3. OFFER BOTH PATHS
"You've got two choices. I can do the repair today and it'll keep you running. Or, if you'd like to see what a new system would look like, someone can walk you through options, so you can compare."

4. MAKE THE NEXT STEP EASY
"Either way is fine. Want me to have {name} give you a call this week with options? There's no obligation."

Rules for the talk

- ✓ **Always fix the problem in front of you** if the homeowner wants it fixed.
- ✓ **Photos, not adjectives.** Show the rust, the burn mark, the reading.
- ✓ **Never scare.** No "this could go any minute" unless it's a real safety issue, and then say exactly what it is.
- ✓ **Hand it off.** The tech plants the seed; the comfort advisor or owner does the options visit.
- ✓ **Write it down.** Age, condition and photos go in the job notes so the office can follow up.

If there's a safety issue

Say what it is and what it means in plain words, and follow your shop's safety procedure. A true safety concern is information, not a sales tactic.

OFFICE TEXT, NEXT DAY
Hi {First name}, {Your name} from {Your company}. {Tech name} mentioned you might want to see options for a new system. I can come by {day} or {day} to walk through them. Which works?

Ads that find homeowners already shopping for a new system.

Replacement shoppers take their time: they search, compare and read reviews for weeks. Catch them on Google when they search, and put the offer in front of homeowners in your towns on Facebook.

Google Search

"new ac unit" "ac replacement"
"furnace replacement" "new furnace"
"heat pump installation"
"hvac replacement cost"

repair parts diy window unit portable
jobs used filter

Sponsored · yourcompany.com/new-system

New AC or Furnace in {City} | See Your Options

Good, better and best options for your home, explained clearly. Local install team. Book a visit.

Sponsored · yourcompany.com/financing

New HVAC, Monthly Payments | Local {City} Team

Ask about monthly payment options on a new AC or furnace. See every option on one visit.

Run the financing ad only if you offer financing. Monthly payment numbers come from your lender, never an estimate.

Facebook and Instagram

Is your system 12+ years old or needing repairs every year? See your options side by side, with the price for each, and pick your install day. Local {City} team, no pressure.

REPLACEMENT OFFER
Thinking about a new system?

A new system doesn't have to be one big bill. Ask about monthly payment options on a new AC or furnace, and see all your choices in one visit.

FINANCING OFFER (ONLY IF YOU OFFER IT)
New system, monthly payments

Got a replacement quote from someone else? Get a second look before you decide. We'll check the system and give you clear written options.

SECOND OPINION
Got a quote? Get a second opinion.

The page: three option cards, photos of your real installs, your reviews and a short form. Replacement shoppers read, so give them more to read than a repair page. Never send them to your homepage.



REBOOST ADS DOES THIS FOR YOU

Replacement and financing ads come ready for Google and Facebook with a matching replacement page, and an instant alert for every new lead, so you can call the shopper first.

Most replacement shoppers don't book on the first visit. Bring them back.

Retargeting shows your ads again to people who already raised their hand: they visited your replacement page, or they're in your own list of open quotes. It's the cheapest way to stay the name they remember while they compare.

Two audiences, both yours

Page visitors	People who visited your replacement page in the last 30 to 60 days and didn't book. Needs the Meta pixel on your pages.
Your open quotes	Upload your own list of open-quote customers to Facebook as a custom audience. Only your customers, never a bought list.

Setup, step by step

1. Make sure the Meta pixel on your replacement page is in your own Meta business.
2. Create an audience of page visitors, last 60 days.
3. Upload open quotes from your software as a customer list.
4. Leave out people who already booked.
5. Run the two ads on the right with a small daily budget, all month.

Still comparing quotes for a new AC or furnace? Check the size, the efficiency, the labor warranty and who you call if something goes wrong. We're happy to walk you through it.

RETARGETING · PAGE VISITORS

Compare quotes the smart way

Your new-system options are still here. No pressure, no pushy follow-up. When you're ready to pick an install day, we'll make it easy. Local {City} team.

RETARGETING · OPEN QUOTES

Ready when you are

KEEP IT FRIENDLY

Retargeting ads should feel like a helpful reminder, not a chase. Change the picture every few weeks, keep the budget small, and stop showing ads to anyone who booked.



REBOOST ADS DOES THIS FOR YOU

Retargeting is available on ReBoost Ads plans: your ads stay in front of people who visited but didn't book, on Facebook and Instagram, with ready-made retargeting ads for HVAC replacement shoppers.

Three options turn "yes or no" into "which one".

One price makes the homeowner decide whether to buy. Three options make them decide what to buy. Build every replacement quote the same way.

	GOOD	BETTER	BEST
For	"Get me running again at a fair price."	"I want it to last and cost less to run."	"I want the most comfortable, quietest option."
Equipment	Standard efficiency, reliable brand	Higher efficiency, better warranty	Top efficiency, variable speed
Extras	Standard thermostat	Smart thermostat, upgraded filter	Smart thermostat, air cleaner, humidity control
Care	Manufacturer warranty	Plus first year of your maintenance plan	Plus extended labor coverage and plan

How to present it

1. Start by repeating what the homeowner told you they care about.
2. Show all three at once, on one page, left to right.
3. Explain each in one sentence, in their words.
4. Say which one you'd pick for their house, and why.
5. Stop talking and let them look.

SAY THIS

"You said the upstairs is always hot and you plan to stay here a while. For that, I'd go with the middle option. But all three will do the job. Which one feels right to you?"

Keep it true: only include warranties, plans and financing your shop really offers. Monthly payment numbers come from your lender, not an estimate.

THE LEAVE-BEHIND, READY TO USE

Your new system, your choice.

Your three options, side by side. Questions any time: call or text {Your name} at {phone}.

- ✓ Who we are: {Your company}, serving {City} since {year}.
- ✓ What happens next: install date, what we'll do, cleanup.
- ✓ What customers say: two or three of your real Google reviews.

A quote without follow-up is a gift to the next company.

Big purchases take time. A homeowner who said "let me think about it" is still deciding. Five short touches over 30 days keep you in the conversation without being pushy.

DAY 0 · THE EVENING OF THE VISIT

Thanks for having me over today, {First name}. Here are your three options again: {link}. Any questions, text me here. {Your name}

DAY 2 · ANSWER THE SILENT QUESTION

Hi {First name}, a lot of homeowners ask how long an install takes. For your house it's about {X} day(s), and we clean up everything before we leave. Happy to answer anything else.

DAY 5 · A REAL REASON

Hi {First name}, just a heads-up: our install schedule for {month} is filling up. If you'd like a specific day, let me know and I'll hold it for you.

Only say the schedule is filling when it is.

REBOOST ADS DOES THIS FOR YOU

New leads from your replacement ads come with an instant alert, so you can reach the shopper first. Add ReBoost Phone for automatic lead text-back, calling and messaging.

DAY 10 · MAKE IT EASY TO SAY NO

Hi {First name}, checking in on the new system. If you've decided to wait or go another way, no problem at all, just let me know so I stop bugging you!

DAY 30 · THE LONG GAME

Hi {First name}, {Your name} from {Your company}. Is your old system still holding up? If you'd like to revisit the options, I'm here. Otherwise we'll see you at your next tune-up.

Follow-up rules

- ✓ One named person owns every open quote.
- ✓ Every open quote has a next-touch date in your software.
- ✓ A phone call beats a text for day 5 if they answered calls before.
- ✓ When they say no, thank them and move them to the tune-up list.

The day-10 "should I stop?" text gets more answers than all the others.

The open-quote list

CUSTOMER	QUOTED	OPTION	VISIT DATE	NEXT TOUCH	OWNER
J. Smith	$11,400	Better	Mar 3	Mar 8 (day 5)	Dave

Keep this in your software if it has a follow-up date field. The rule is the same: every open quote has a name and a date.

Four things homeowners say, and what to say back.

"That's more than I expected."

> SAY THIS
> "That's fair, it's a big purchase. Can I ask what you had in mind? The good option on the left is built for exactly that. And if you'd like to spread it out, I can show you the financing we offer."

Mention financing only if you offer it.

"We need to think about it."

> SAY THIS
> "Of course. Most people do. Is it the price, the option, or the timing you want to think over? I'd rather answer it now than have you wonder later."

"We're getting other quotes."

> SAY THIS
> "Smart. When you compare, check that the quotes are for the same size and efficiency, what warranty comes with the labor, and who you call if something goes wrong. I'm happy to walk through any of them with you."

"Can't you just fix it?"

> SAY THIS
> "Absolutely, and I'll do it today if you want. I just want you to know what's likely next at this age, so the next repair isn't a surprise. Your call."

THE ONE RULE

Find out the real reason, answer it honestly, then set a next step. Never argue, never pressure.

Hand this to anyone "getting other quotes"

- [ ] Same size and efficiency in every quote?
- [ ] Is removal of the old system included?
- [ ] Permits and inspection included?
- [ ] How long is the labor warranty, not just the parts?
- [ ] Who do you call if something goes wrong, and how fast do they come?
- [ ] Does the price include the thermostat and cleanup?

WHEN THEY SAY NO

Thanks for letting me know, {First name}. No hard feelings at all. We'll keep your info on file, and we're here for tune-ups or anything else you need.

WHEN THEY SAY "LATER"

Totally fine. Want me to check back in {month}? Your options will still be on file, and I'll update the pricing then.

Every "no" goes back on the tune-up list. Today's no is often next year's install.

Five numbers that tell you if replacements are working.

Check these every Monday. They show exactly where the leak is: not enough visits, not enough options, or not enough follow-up.

NUMBER	WHERE IT COMES FROM	IF IT'S LOW, FIX THIS
Older systems seen	Service and tune-up calls on systems 12+ years old	Book more tune-ups (your list, ads)
Options visits set	Tech hand-offs plus direct shoppers	The tech's talk (page 4)
Quotes given	Every options visit should end with three options	Good, better, best (page 7)
Quotes closed	Signed replacements	Follow-up and objections (pages 8 and 9)
Open quotes with a next date	Should be every one of them	One owner per quote, a date in the software

WORKED EXAMPLE

A shop sees 40 older systems a month. Techs set 12 options visits, all 12 get three options, and 4 close. At an $11,000 average, that's $44,000. If better follow-up closes one more a month, that's another $11,000, from the same calls.

This month's three moves

1. Pull every open quote from the last 12 months and start the page 8 follow-up.
2. Walk every tech through the page 4 talk in one meeting.
3. Rebuild your quote template as good, better, best.

Round numbers to show the math. Your ticket and close rate are the ones that count.

Fill it in every Monday

WEEK OF	OLDER SYSTEMS SEEN	OPTIONS VISITS	QUOTES GIVEN	QUOTES CLOSED	OPEN WITH A DATE

REBOOST ADS DOES THIS FOR YOU

Spend, leads and cost per lead for your replacement ads in one place, so the "direct shoppers" side of this pipeline fills in without a spreadsheet.

TOO BUSY TO DO ALL THIS BY HAND?

Don't want to do it yourself? ReBoost Ads does it for you.

Your techs and your follow-up close replacements. Ads and retargeting bring in the shoppers who never called you before, and they take real work to run. ReBoost Ads sets up your HVAC ads inside your own Google and Facebook ad accounts, so you can get back to the trucks.

1. **Pick the service** you want more jobs for
2. **Pick a ready-made ad** and its matching page
3. **Add your offer** like a free estimate
4. **Hit submit** and you're done

Set up in about 5 minutes. No ads expert needed.

THE JOB	BY HAND	WITH REBOOST ADS
Write the ads	Hours on headlines, copy and photos	**Ready-made, with your logo, phone and offer**
Build the landing page	A page per offer, with a form that works on phones	**A matching HVAC page for every ad**
Answer new leads	Someone watching the inbox all day	**An instant alert the moment a lead comes in**

Start your 14-day free trial

reboosthub.com/hvac-ads-builder

Plans start at $97/mo. Cancel anytime. Your ad spend is paid to Google and Facebook separately.

SCAN TO START