



LEAD LEAKAGE CHECKLIST

# Seven Places HVAC Companies **Lose** Booked Jobs

A practical checklist to find where calls, web leads, estimates, and repeat customers slip through the cracks.

THE LEAD JOURNEY



CAPTURE



RESPOND



BOOK



RECOVER

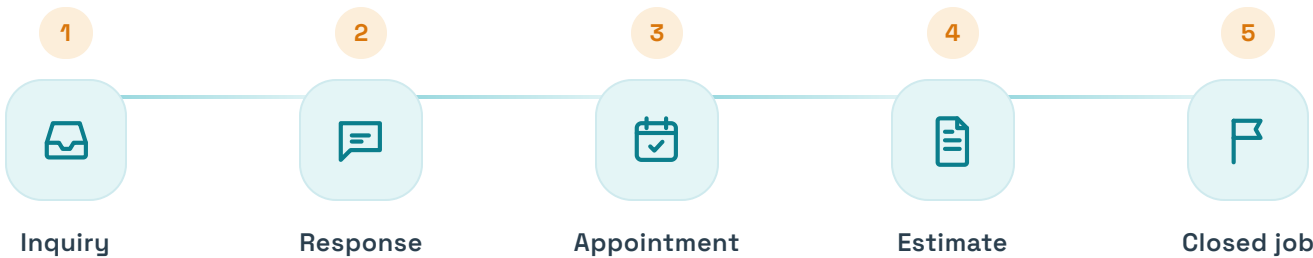


THE REAL PROBLEM

# More leads won't fix a broken follow-up process

Many HVAC companies already generate demand. The hidden loss happens **after the phone rings** or the form is submitted — in the handoffs between steps.

A SIMPLE LEAD JOURNEY



⚡ Every handoff is a place where speed, ownership, or consistency can fail. The goal isn't to automate everything — it's to remove preventable delay and forgotten follow-up.



Track the lead

Track the lead from first contact to booked appointment.



Clarify the next step

Make the next step clear for both the customer and the team.



Automate the repetitive

Use automation for repetitive actions, not to replace human judgment.



WHERE THE JOB SLIPS AWAY

# Missed calls with no instant response

Homeowners often call multiple contractors. When nobody answers and nothing happens next, the opportunity can disappear before the office calls back.



## What a better system does



Send an immediate text acknowledging the call.



Ask for the service type and ZIP code.



Notify the office and create a callback task.



## QUICK CHECK

Can your team see exactly what should happen next when this situation occurs?



WHERE THE JOB SLIPS AWAY

# Slow response to web and ad leads

A form submission is a live buying signal. Waiting hours — or until the next morning — gives faster competitors time to book the job.



## What a better system does



Confirm the request within minutes.



Route the lead by service area and urgency.



Offer a clear booking or callback option.



## QUICK CHECK

Can your team see exactly what should happen next when this situation occurs?



WHERE THE JOB SLIPS AWAY

# One-and-done follow-up

Many leads do not reply to the first call or message. Treating silence as rejection leaves good opportunities untouched.



## What a better system does



Use a short, respectful multi-touch sequence.



Change the channel: call, text, then email.



Stop automatically when the customer replies.



## QUICK CHECK

Can your team see exactly what should happen next when this situation occurs?



WHERE THE JOB SLIPS AWAY

# Unsold estimates that go quiet

Replacement and repair estimates can require time, comparison, financing questions, or another decision-maker. No follow-up means no second chance.



## What a better system does



Schedule follow-up around the decision window.



Address common concerns: timing, financing, warranty.



Escalate interested replies to a salesperson.



## QUICK CHECK

Can your team see exactly what should happen next when this situation occurs?



WHERE THE JOB SLIPS AWAY

# After-hours and weekend demand

Emergency demand does not follow office hours. A caller who gets silence may keep dialing until another company responds.



What a better system does



Acknowledge the request immediately.



Set expectations for emergency or next-day service.



Capture enough detail for a fast handoff.



QUICK CHECK

Can your team see exactly what should happen next when this situation occurs?



WHERE THE JOB SLIPS AWAY

# No-show and appointment leakage

A booked appointment is not guaranteed revenue. Missing reminders, unclear arrival windows, and poor rescheduling options create avoidable gaps.

 What a better system does

-  Send confirmation and reminder messages.
-  Make rescheduling easy.
-  Alert the team when a customer confirms or cancels.



QUICK CHECK

Can your team see exactly what should happen next when this situation occurs?





WHERE THE JOB SLIPS AWAY

# Dormant customers and old leads

Past customers and unclosed opportunities already know the company. Without structured reactivation, the database becomes storage instead of a revenue asset.



## What a better system does



Segment by service history and season.



Use helpful maintenance or replacement reminders.



Route replies to a real person quickly.



## QUICK CHECK

Can your team see exactly what should happen next when this situation occurs?

10-MINUTE SELF-CHECK

# How many leaks are visible in your current process?

Give one point for each statement that is true today.

- ☐ Missed calls do not always receive an immediate text.
- ☐ Web leads can wait more than 10 minutes for a first response.
- ☐ Follow-up usually stops after one or two attempts.
- ☐ Unsold estimates are not followed through a defined sequence.
- ☐ After-hours inquiries rely on voicemail only.
- ☐ Appointment confirmations and reminders are inconsistent.
- ☐ Old leads and past customers are rarely reactivated.

YOUR SCORE

0-2

Mostly controlled

3-4

Revenue risk

5-7

Immediate priority

⚡ NEXT STEP

# Find the leaks before you buy more leads.

A short audit can map where a prospect enters, who responds, what follow-up happens, and where the handoff breaks.

GET YOUR PERSONALIZED REVIEW

Message **“AUDIT”** for a personalized HVAC lead-recovery review that pinpoints your highest-value fix first.

➤ Message **“AUDIT”** on LinkedIn

to **Mahaza Fayyaz**