



## Your Report

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Variable: `csr_call_center_percent_of_revenue_hvac_industry` Definition: Percentage of total revenue expended on customer service representative (CSR) and call center labor costs in HVAC businesses. Value: Client-provided Top Performers: Elite 10-20% achieve 2-3% via 95%+ call answer rates, AI scheduling tools, and multi-role staff training (ServiceTitan 2023 HVAC Benchmarks, Nexstar 2022). Value Tiers: <\$1M revenue: 4-6%; \$1-5M: 3-5%; >\$5M: 2-4% (PHCC surveys). Red Flag Trigger: >6% regardless of revenue size. Default Value: 4.0%

Variable: `management_overhead_labor_percent_of_revenue_hvac_industry` Definition: Percentage of total revenue spent on management, administrative, and non-field overhead labor in HVAC companies. Value: Client-provided Top Performers: Top performers limit to 4-6% by owner-led operations (<500 field hours/year) and lean staffing (Nexstar 2023, ServiceTitan 2024). Value Tiers: <\$1M revenue: 7-10%; \$1-5M: 6-8%; >\$5M: 5-7% (ACCA Financial Surveys). Red Flag Trigger: >10% or >8% for >\$5M revenue. Default Value: 7.0%

Variable: `marketing_sales_percent_of_revenue_hvac_industry` Definition: Percentage of total revenue allocated to marketing, advertising, and sales labor/commissions in HVAC firms. Value: Client-provided Top Performers: Elite achieve 3-5% with 4x+ ROI via digital leads, SEO, and 60%+ closing rates (ServiceTitan 2023, Jobber 2024 Benchmarks). Value Tiers: <\$1M revenue: 6-9%; \$1-5M: 5-7%; >\$5M: 4-6% (Housecall Pro surveys). Red Flag Trigger: <2% (underinvesting) or >9%. Default Value: 6.0%

Variable: `avg_cost_to_book_service_call_hvac_industry` Definition: Average cost (marketing + CSR labor) to book one service call in HVAC businesses. Value: Client-provided Top Performers: Top 20% average \$50-65 via optimized digital ads (Google/FB) and 80%+ show rates (ServiceTitan 2024, FieldEdge reports). Value Tiers: <\$1M revenue: \$80-110; \$1-5M: \$65-90; >\$5M: \$50-75 (Nexstar data). Red Flag Trigger: >\$110 or <\$30 (unsustainable). Default Value: \$80

Variable: `closing_ratio_in_home_sales_percent_hvac_industry` Definition: Percentage of in-home sales calls (e.g., maintenance to replacement) that close successfully in HVAC. Value: Client-provided Top Performers: Elite 55-65% via certified sales training, options selling, and 80%+ customer satisfaction (Nexstar 2023, EGIA reports). Value Tiers: <\$1M revenue: 30-40%;

\$1-5M: 35-45%; >\$5M: 40-50% (ServiceTitan 2023).Red Flag Trigger: <30%.Default Value: 40.0%

Variable: vehicles\_fuel\_percent\_of\_revenue\_hvac\_industryDefinition: Percentage of total revenue spent on vehicles, fuel, maintenance, and related fleet costs in HVAC.Value: Client-providedTop Performers: Top performers hold at 5-7% with GPS telematics, fuel cards, and 3-year truck replacement cycles (ServiceTitan 2024, ACCA).Value Tiers: <\$1M revenue (1-5 techs): 7-10%; \$1-5M (6-20 techs): 6-8%; >\$5M: 5-7% (PHCC benchmarks).Red Flag Trigger: >10% or <3%.Default Value: 7.0%

Variable: rent\_utilities\_percent\_of\_revenue\_hvac\_industryDefinition: Percentage of total revenue for rent, leases, and utilities on facilities in HVAC businesses.Value: Client-providedTop Performers: Elite maintain 1.5-2.5% via warehouse optimization and energy-efficient shops (Nexstar 2022, Contractor Magazine surveys).Value Tiers: <\$1M revenue: 2.5-4%; \$1-5M: 2-3%; >\$5M: 1.5-2.5% (BizMiner reports).Red Flag Trigger: >4%.Default Value: 2.5%

Variable: software\_tech\_support\_percent\_of\_expenses\_hvac\_industryDefinition: Percentage of total operating expenses (not revenue) for software subscriptions and tech support in HVAC firms.Value: Client-providedTop Performers: Top 20% at 1-1.5% with integrated platforms (e.g., ServiceTitan) yielding 20%+ efficiency gains (ServiceTitan 2024, Jobber).Value Tiers: <\$1M revenue: 2-3%; \$1-5M: 1.5-2.5%; >\$5M: 1-2% (Housecall Pro data).Red Flag Trigger: >3% of expenses.Default Value: 2.0%

Variable: avg\_days\_invoices\_outstanding\_hvac\_industryDefinition: Average number of days HVAC invoices remain unpaid (DSO) before collection.Value: Client-providedTop Performers: Elite 20-28 days via automated invoicing, financing options, and 98% collection rates (ServiceTitan 2023, FieldEdge).Value Tiers: <\$1M revenue: 35-45 days; \$1-5M: 30-40 days; >\$5M: 25-35 days (RMA Statement Studies).Red Flag Trigger: >45 days.Default Value: 35

Variable: annual\_parts\_supplies\_inventory\_turnover\_hvac\_industryDefinition: Number of times per year HVAC parts and supplies inventory is sold and replenished.Value: Client-providedTop Performers: Top performers achieve 10-14x via just-in-time ordering and van stocking discipline (PHCC 2023, Nexstar).Value Tiers: <\$1M revenue: 6-9x; \$1-5M: 8-11x; >\$5M: 9-12x (Successware benchmarks).Red Flag Trigger: <6x.Default Value: 9

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