CEO CoPilot

Your Report

Variable: {customer_lifetime_value_hvac_industry}
Definition: Projected total revenue from a single HVAC customer over their entire relationship, including services, repairs, maintenance, and replacements.
Value: $9,200 (ServiceTitan 2023 avg)
Top Performers: Top 20% achieve $18,000+ with 35%+ maintenance penetration, high upsell rates, and loyalty programs (Nexstar).
Value Tiers: <$1M rev: $6,000–$9,000; $1M–$5M: $9,000–$15,000; >$5M: $15,000–$25,000
Red Flag Trigger: < $5,000
Default Value: $9,200

Variable: {clv_to_cac_ratio_hvac_industry}
Definition: Ratio of customer lifetime value to customer acquisition cost, indicating marketing and sales efficiency.
Value: 3:1 (ServiceTitan/Nexstar avg)
Top Performers: 5:1+ via referrals (40% of leads) and targeted digital ads (Nexstar).
Value Tiers: N/A – Not applicable
Red Flag Trigger: < 2:1
Default Value: 3:1

Variable: {fixed_costs_annual_hvac_industry}
Definition: Annual fixed overhead expenses including rent, admin salaries, insurance, and utilities (excludes variable costs and direct labor).
Value: N/A – scales with size
Top Performers: 22-28% of revenue through outsourcing and tech automation (PM Magazine).
Value Tiers: $250K–$1M rev: $150K–$350K; $1M–$5M: $400K–$1.5M; >$5M: $1.5M–$4M
Red Flag Trigger: >35% of revenue
Default Value: $750,000 (for $2.5M avg firm)

Variable: {variable_cost_percent_of_revenue_hvac_industry}
Definition: Variable costs (materials, parts, supplies) as percentage of total revenue, excluding labor.

Value: 28% (ServiceTitan/PM 2023 avg)

Top Performers: <22% with vendor negotiations and inventory mgmt (ACCA).

Value Tiers: N/A – Not applicable

Red Flag Trigger: >35%

Default Value: 28%

Variable: {tax_rate_percent_hvac_industry}

Definition: Effective combined federal, state, and local income tax rate after deductions for HVAC businesses.

Value: 26% (RMA Annual Statement Studies 2023)

Top Performers: 22-24% via Section 179 and R&D credits (PHCC).

Value Tiers: N/A – Not applicable

Red Flag Trigger: >35% or <20%

Default Value: 26%

Variable: {depreciation_annual_hvac_industry}

Definition: Annual depreciation expense on assets like trucks, HVAC equipment, and tools.

Value: N/A – asset dependent

Top Performers: 4-6% of revenue with efficient fleet mgmt (NECA/PHCC).

Value Tiers: 1-5 techs: $40K–$100K; 6-20 techs: $100K–$300K; >20 techs: $300K+

Red Flag Trigger: N/A – Not applicable

Default Value: $150,000

Variable: {interest_expense_annual_hvac_industry}

Definition: Annual interest paid on business debt such as equipment loans and lines of credit.

Value: N/A – debt dependent

Top Performers: <2% of revenue with low-leverage ops (BizMiner).

Value Tiers: $1M–$5M rev: $20K–$100K; >$5M: $100K–$300K

Red Flag Trigger: >5% of revenue

Default Value: $50,000

Variable: {employee_satisfaction_score_hvac_industry}

Definition: Average employee satisfaction score (e.g., eNPS scale -100 to 100 or 0-100 equivalent).

Value: 55 (Jobber 2023 Field Service avg)

Top Performers: 75+ with training, bonuses, and career paths (ServiceTitan).

Value Tiers: N/A – Not applicable

Red Flag Trigger: <40

Default Value: 55

Variable: {recruitment_cost_per_hire_hvac_industry}

Definition: Average cost to recruit and onboard one new employee, especially technicians.

Value: $5,800 (Contractor Magazine 2023; higher for techs ~$7K)

Top Performers: <$4,000 via employee referrals and partnerships (Nexstar).

Value Tiers: Admin: $3K–$5K; Techs: $5K–$10K

Red Flag Trigger: >$10,000

Default Value: $5,800

Variable: {vendor_on_time_delivery_percent_hvac_industry}

Definition: Percentage of vendor orders delivered on time, impacting job efficiency.

Value: 92% (FieldEdge/Insights 2023 avg)

Top Performers: 97%+ with key supplier partnerships (PHCC).

Value Tiers: N/A – Not applicable

Red Flag Trigger: <85%

Default Value: 92%

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