



Your Report

Variable: {warranty_claims_percent_hvac_industry}

Definition: Percentage of annual revenue spent on warranty claims/returns for HVAC services and equipment.

Value: Client-provided

Top Performers: Elite 10-20% achieve <1.5% via technician training, quality control, and manufacturer partnerships (ServiceTitan, Nexstar benchmarks).

Value Tiers: N/A – Not applicable

Red Flag Trigger: >4%

Default Value: 2.5%

Variable: {prior_year_revenue_hvac_industry}

Definition: Average prior-year gross revenue for U.S. HVAC contractors from industry surveys.

Value: Client-provided

Top Performers: N/A – Not applicable

Value Tiers: Small (<\$1M): \$750K; Mid (\$1-5M): \$2.5M; Large (>\$5M): \$12M (PHCC, IBISWorld).

Red Flag Trigger: N/A – Not applicable

Default Value: \$1,800,000

Variable: {owner_operations_time_percentage_hvac_industry}

Definition: Percentage of owner/operator time spent on daily field or operational tasks vs. strategic work.

Value: Client-provided

Top Performers: Elite achieve 0-5% by delegating to managers and focusing on sales/growth (Nexstar, EGIA).

Value Tiers: N/A – Not applicable

Red Flag Trigger: >25% (especially >\$2M revenue)

Default Value: 15%

Variable: {revenue_per_tech_hvac_industry}

Definition: Annual gross revenue generated per full-time field technician in HVAC.

Value: Client-provided

Top Performers: Top 20% exceed \$650K via high attach rates, upsells, and 2,000+ billable hours/tech (ServiceTitan, Nexstar).

Value Tiers: <\$1M rev: \$350K; \$1-3M: \$450K; \$3-10M: \$550K; >\$10M: \$600K+

Red Flag Trigger: <\$300K

Default Value: \$450,000

Variable: {technician_idle_time_percentage_hvac_industry}

Definition: Percentage of total shift time technicians spend idle (non-billable, waiting for calls/parts).

Value: Client-provided

Top Performers: Elite <8% through dynamic dispatching and call volume management (Jobber, FieldEdge).

Value Tiers: N/A – Not applicable

Red Flag Trigger: >25%

Default Value: 18%

Variable: {net_margins_hvac_industry}

Definition: Net profit margin after all expenses as percentage of gross revenue in HVAC.

Value: Client-provided

Top Performers: Top 20% achieve 16-20% via cost controls, high gross margins (50%+), low overhead (ServiceTitan, PHCC).

Value Tiers: <\$1M rev: 8%; \$1-5M: 10%; >\$5M: 12%

Red Flag Trigger: <5%

Default Value: 10%

Variable: {inefficiency_baseline_per_factor_hvac_industry}

Definition: Average percentage productivity loss per common inefficiency factor (e.g., dispatching, travel, parts delays) in HVAC.

Value: Client-provided

Top Performers: Elite limit to <3% per factor via software/tech optimization (ServiceTitan, Housecall Pro).

Value Tiers: N/A – Not applicable

Red Flag Trigger: >8% per factor

Default Value: 5%

Variable: {owner_workweek_hours_hvac_industry}

Definition: Average weekly working hours for HVAC business owners/operators.

Value: Client-provided

Top Performers: Elite work 40-45 hours focused on high-value tasks like sales (Contractor Magazine, Nexstar).

Value Tiers: N/A – Not applicable

Red Flag Trigger: >65 hours

Default Value: 55

Variable: {max_owner_managed_techs_hvac_industry}

Definition: Maximum number of field technicians effectively managed by an owner before needing dedicated operations support.

Value: Client-provided

Top Performers: N/A – Not applicable

Value Tiers: N/A – Not applicable

Red Flag Trigger: >12 techs without ops manager

Default Value: 10

Variable: {revenue_threshold_for_ops_manager_hvac_industry}

Definition: Annual revenue level at which HVAC contractors should hire a dedicated operations manager.

Value: Client-provided

Top Performers: N/A – Not applicable

Value Tiers: N/A – Not applicable

Red Flag Trigger: >\$2M without ops manager

Default Value: \$2,000,000

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