



# HVAC Business Plan Template (2026 Edition)

## 1. Executive Summary

**Instruction:** This is a high-level overview of your business. Complete this section last, once you have detailed the rest of your plan.

### **Mission Statement**

*What it is:* A 1-2 sentence summary of your company's purpose.

Your Response:

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### **Vision**

*What it is:* Where do you see the company in 3-5 years?

Your Response:

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### **Competitive Advantage**

*What it is:* What makes you better than local competitors? (e.g., Using Workiz for 24/7 automated booking).

Your Response:

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### **Investment Proposal (The Ask)**

*What it is:* How much capital do you need and specifically what for?

Your Response:

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## 2. Business Overview

**Instruction:** Describe the legal and operational setup of your startup.

### **Business Purpose:**

*What it is:* Why are you starting this business now? (e.g., demand for heat pump electrification).

*Example:* To meet the growing local demand for heat pump electrification in 2026.

Your Response:

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### **Legal Structure:**

*What it is:* (e.g., LLC, Corporation, or Partnership).

*Example:* LLC or Partnership.

Your Response:

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### **Service Area:**

*What it is:* List specific cities, counties, or zip codes.

Your Response:

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### 3. Start-Up Summary (Equipment & Tools)

**Instruction:** List essential gear required for 2026 standards, such as A2L-ready tools.

Tool / Equipment	Purpose	Estimated Cost
[e.g., A2L Recovery Unit]	[Handling R-454B gas]	\$
[e.g., Service Van]	[Daily field operations]	\$
[e.g., Workiz FSM Software]	[Dispatching & Invoicing]	\$
		\$
		\$
		\$
		\$
		\$
		\$

### 4. Market Analysis

**Instruction:** Define who you are selling to and who your rivals are in the current landscape.

**Target Customer Profile:** \* *Example:* Homeowners aged 35–65 needing system upgrades.

Your Response:

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## 6. Marketing and Sales Plan

**Instruction:** Outline how you will attract leads and convert them into paying customers.

**Marketing Strategy 1:** [e.g., Google Local Services Ads]

Your Response:

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**Marketing Strategy 2:** [e.g., Automated Review Collection via Workiz]

Your Response:

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**Sales Strategy:** [e.g., Offering financing options in digital invoices]

Your Response:

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## 7. Financial Plan

**Instruction:** Project your financial health for the first 12–36 months.

- **Sales Forecast (Year 1):** \$ [Amount]
- **Budget Overview:** [List fixed and variable costs]
- **Break-Even Point:** [When will income cover all startup and operational costs?]

**Sales Forecast (Year 1):** \$ \_\_\_\_\_

**Monthly Fixed Costs** (Rent, Software, Insurance): \$ \_\_\_\_\_

**Monthly Variable Costs** (Labor, Fuel, Parts): \$ \_\_\_\_\_

**Break-Even Point:** (Jobs per month needed to cover costs).

Your Response:

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