
[Your Company Name]

[Company Tagline]

Business Plan

[Date]

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Executive Summary

[Your Company Name] will be set up as a limited liability company in [Your State] to offer high-quality HVAC services. Currently, many companies in this industry suffer from poor project management, job scheduling, and low retention of quality employees. [Your Company Name] believes that we can solve these problems.

Objectives

- To achieve sales revenue of approximately \$500,000 in Year 1.
- To achieve a diverse customer mix consisting of residential, commercial, and industrial.
- To expand operations to include all of {Your State}.

Market Analysis

According to IBISWorld, the HVAC industry in the US has a market size of \$120bn. With 118k businesses operating in this industry, the industry has no big players with a market share of more than 5%.

Source:

<https://www.ibisworld.com/united-states/market-research-reports/heating-air-conditioning-contractors-industry/>

Driving Factors

The current rapid expansion of the construction industry will aid the HVAC market growth. HVAC is an essential part of the construction industry. HVAC companies are hired on every new construction project and for the maintenance of most buildings & infrastructure.

Organizational Structure

We will start with three employees: a sales manager (the founder) and two HVAC technicians. As sales grow, we will ensure that we hire the most qualified, competent, honest, and hardworking employees to occupy all the available positions in our company.

Roles to be occupied in year one include various HVAC technicians, a project manager, a dispatch manager, and an office manager.

We will retain vendors for legal, marketing, and accounting services.

HVAC Services

[Your Company Name] will offer various services primarily focused on residential and commercial HVAC services. The firm will also provide such services as rooftop HVAC, water heater repairs, whole-home dehumidifiers, and more. The goal is to provide our clients with a broad range of related services that will minimize their need to employ a variety of contractors.

Marketing & Sales

We will contract a third-party design or marketing agency to design a new website. The website will be a marketing piece that clearly presents the value we offer to our clients and makes it easy for clients to request a quote. Our sales manager or estimators will receive quote requests and schedule appointments with potential clients.

Website Objectives:

- Get traffic from search engines from people looking for HVAC companies.
- Efficiently convert visitors into customers.
- Host landing pages for use in paid advertising (Google Ads, Facebook Ads, Etc.)
- Collect and display client testimonials.
- Collect and display project galleries.

Funding Requests

Expenses	Amount
Incorporation & legal fees (1 year)	\$150
Domain name & email accounts (1 year)	\$250
Insurance (1 year)	\$3000
Accounting fees (1 year)	\$3600
Business phone (1 year)	\$500
Team uniforms or T-shirts (1 year)	\$1000
Website including professional sales copy	\$4000
Payroll (3 months)	\$43,200
Equipment, tools, supplies	\$8,000
Total Funds Requested	\$63,700

Financial Projections for the third year in business

Revenue	\$1,500,000
HVAC technicians	\$525,000
Materials	\$150,000
Project managers	\$130,000
Estimator	\$60,000
Office Manager	\$50,000
General Manager (Owner's salary)	\$70,000
Marketing	\$105,000
Other overhead (software, fees, rent, insurance, legal, compliance, etc)	\$25,000
Profit	\$385,000

Appendix

[Attach or link to leadership resumes]

[Attach or link to any relevant licenses]

[Attach or link to any credit histories or bank statements]