



HVAC PLAYBOOK

Record Setting Growth 🚀🚀🚀

HVAC PLAYBOOK



HVAC PLAYBOOK FOR RECORD SETTING GROWTH!!!

Welcome the HVAC Playbook for Record Setting Growth

In today's dynamic business environment, adaptability and innovation are key to thriving amidst constant change. Our aim with this playbook is to provide your HVAC company with a comprehensive toolkit rooted in proven strategies, enabling you to achieve unprecedented growth and revenue milestones.

At Hero Marketing Agency, our team is dedicated to partnering with you and your team to drive tangible results in your marketing endeavors. This playbook serves as a dynamic resource, guiding you through the process of crafting a robust marketing plan and pinpointing areas for enhancement or modification to maximize customer acquisition, leading to increased job bookings and a stronger market presence. Ultimately, these efforts will translate into substantial growth in your top-line revenue.

I can guarantee that by following the secrets and proven methodology outlined in this playbook, you'll not only gain valuable knowledge and guidance but also feel empowered as you chart a course toward your next phase of success, both personally and professionally. Our agency has used this exact model to drive tens of millions of dollars in new revenue for our clients over the years.

Now let's jump right in!

"You can't really know where you're going until you know where you have been."

– Maya Angelou



Joshua D. Cates
Hero Marketing Agency Founder
Author of *The Marketing Revolution*

EXERCISE 1: PERSONAL AND BUSINESS SELF ANALYSIS

Step 1: Reflection And Goal Setting

First and foremost, I encourage you to look inward and ask yourself these questions:

- Why are you wanting to grow in business?
- Is it purely for the money?
- Have you defined your priorities?
- Have you set clear goals?
- Are you prepared to minimize distractions and bad habits / thoughts surrounding marketing?
- What is frustrating you right now with your marketing?

Step 2: Self-Assessment Task

Let's get into our first self-assessment task.

Are you growing your top-line revenue each year?

Yes No

Do you have deep industry knowledge in your field?

List out your top 3-5 competitive advantages.

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List 3 strategic partnerships you could put in place this year.

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How much market share do you currently own in your market area?

5% 10% 25% 50% 75% I don't know

If you don't know how to determine this, I would strongly suggest hiring a marketing agency to conduct a keyword research strategy and assess your current paid media advertising. If your customer isn't finding you, then it's naturally going to be hard to dominate your market.

PRO TIP: For paid media, the term you are wanting to identify is "impression share." For example is there are 1,000 keyword searches in your market each month for "best AC company near me" and your paid media has you showing up for 100 of those, then you have a 10% impression share.

Are you using data points to drive decisions?

Here are several key areas you should be measuring. Check "yes" or "no" to do a self-assessment.

• Do you know the number of calls you receive each month?

Yes No

• Do you know the number of website leads you receive each month?

Yes No

• Is your website traffic growing or shrinking?

Growing Shrinking I Don't Know

• Do you monitor your paid advertising efforts? And do you understand clearly what is working and not working?

Yes No

• Do you monitor your organic and paid ranking keywords and ranking results?

Yes No

• Are you A/B testing your paid ads? Meaning trying different visual and copy to determine what resonates with a potential customer.

Yes No

• **Do you know the LTV (lifetime value) of your customer?**

Yes No

• **Finally, if you know your LTV, then do you know your Customer Acquisition Cost?**

Yes No

Step 3: Where are you weak?

In my book *The Marketing Revolution* I talk about the danger of working on your weaknesses. In the area below write down 3 areas (weaknesses) that are taking up your time. These should be 3 weaknesses you want off your plate within the next 30 days.

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Step 4: SWOT Analysis

In the area below let's complete your SWOT Analysis by writing down 3 answers for each area. After writing them down, I would encourage you to share your answers with your team, and also ask them to perform this exercise on their own. Once you have a consensus on your SWOT, you will be well on your way to building solutions and marketing tools to leverage this simple, but impactful business exercise.

STRENGTHS

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WEAKNESSES

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OPPORTUNITIES

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THREATS

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Step 5: Start to Identify Where Change is Needed

Let's start identifying areas where change is needed. In this exercise, ask yourself these five simple and telling questions and document your answers.

1. In what ways do you most often hear compliments and also criticism?

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2. Can you name any perks or features that your rivals provide that you don't, and can you match or beat those perks?

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3. Name three areas you feel need to change or be improved upon in your company right now.

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4. What is your current new customer acquisition cost?

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5. Are you meeting your strategic objectives?

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EXERCISE 2: ESTABLISHING YOUR COMPANY BASELINE USING OUR 10 COMMON MARKETING MISTAKES EXERCISE

Read through our 10 common marketing mistakes and ask yourself how you rank for each one. Be honest with yourself. It's ok if this reveals some frustration – that's the point of going through this exercise.

1. Ignoring Target Audience:

Failing to define and understand your target audience can lead to ineffective marketing strategies. Are you creating buyer personas based on data and insights, then tailoring your marketing efforts to address their specific needs and preferences?

Rank 1 – 10 – Importance Score 8/10

1	2	3	4	5	6	7	8	9	10
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2. Inconsistent Branding:

Do you have inconsistency in branding, including visuals and messaging which can confuse your audience? It's critical to develop and adhere to a cohesive brand guide across all channels to build trust and recognition.

Rank 1 – 10 - Importance Score 6/10

1	2	3	4	5	6	7	8	9	10
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3. Overlooking Analytics:

Neglecting to analyze and interpret marketing analytics can result in missed opportunities. Are you using data analysis and tools like Google Analytics to track organic and paid ad performance, identify trends, and make data-driven decisions in your marketing? Are you looking at this data monthly?

Rank 1 – 10 - Importance Score 9/10

1	2	3	4	5	6	7	8	9	10
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4. Neglecting Mobile Optimization:

With the rise of mobile usage, not optimizing your website and CTAs for mobile devices can lead to a significant loss of potential customers. Is your website mobile friendly and easy to navigate / schedule an appointment? Are you tracking these metrics anywhere? Do you own your website, or lease your website?

Rank 1 – 10 - Importance Score 8/10

1	2	3	4	5	6	7	8	9	10
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5. Ignoring Social Media Engagement:

Simply broadcasting messages on social media without engaging with your audience can be detrimental. Are you actively participating in conversations, responding to comments, and building relationships on social platforms?

Rank 1 – 10 - Importance Score 6/10

1	2	3	4	5	6	7	8	9	10
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6. Relying Solely on One Marketing Channel:

Putting all your marketing efforts into one channel can leave you vulnerable to changes in the market. How are you doing on diversifying your marketing mix to reach a broader audience and reduce risk? Follow the 75/15/10 rule discussed in my book *The Marketing Revolution*.

Rank 1 – 10 - Importance Score 6/10

1	2	3	4	5	6	7	8	9	10
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7. Ignoring Customer Feedback:

Customer feedback is valuable for improving products and services. Ignoring or dismissing customer feedback can result in a negative reputation. Do you have an active strategy for Google review and reputation management?

Rank 1 – 10 - Importance Score 9/10

1	2	3	4	5	6	7	8	9	10
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8. Focusing Too Much on Features, Not Benefits

Highlighting product features without explaining the benefits to the customer may not resonate. Are you clearly communicating how your product and services solves the customer’s problems or fulfills their needs?

Rank 1 – 10 - Importance Score 7/10

1	2	3	4	5	6	7	8	9	10
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9. Neglecting Content Quality:

Poor-quality content can harm your brand image. Are you investing in creating high-quality, relevant content (like blogs on your website, posts on Google and email newsletters) that add value to your audience and positions your HVAC business as an authority in your industry and market?

Rank 1 – 10 - Importance Score 9/10

1	2	3	4	5	6	7	8	9	10
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10. Lack of a Clear Call to Action (CTA):

If your marketing materials lack a clear CTA, potential customers may be unsure about the next steps. Are you clearly stating what you want your audience to do, whether it’s making a purchase, signing up, or booking an appointment?

Rank 1 – 10 - Importance Score 8/10

1	2	3	4	5	6	7	8	9	10
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Congratulations you are done with this exercise!

Now, let's proceed with creating a scoring system for the 10 questions and their answers using a 1-10 ranking score. The importance score of each question reflects the significance or relevance of the question within the context it's being asked.

- (Q score) represents the score assigned to the answer of a particular question using 1-10.
- (Importance score of Q) represents the importance or weight of that question.
- "X" represents the resulting score when you multiply the score of the answer by the importance of the question.

Calculate using this formula: (Q score) ___ x (Importance score of Q) ___ = X

As a reminder your "importance" score for the 10 questions are as follows: 8, 6, 9, 8, 6, 6, 9, 7, 9, 8.

To receive your final analysis and free marketing audit report, please share your results by email to josh@marketlikeahero.com

EXERCISE 3: THE GOAL WITH THIS EXERCISE IS TO IDENTIFY HOW YOUR WEBSITE AND GOOGLE BUSINESS PROFILE (GBP) ARE PERFORMING AND RANKING FOR ORGANIC SEARCH TERMS, AND COMPARE THAT TO BOTH YOUR MARKET'S SEARCH VOLUME AND OTHER COMPETITORS IN YOUR SPACE.

Instructions on how to complete this exercise:

1. Rate each aspect of your GBP performance and SEO efforts on a scale of 1-10, with 1 being the lowest and 10 being the highest.
2. Provide comments/notes for each rating to explain your assessment and any specific observations.
3. After completing the ratings, identify the top priority areas for improvement based on your scores.
4. Our team at Hero Marketing will develop action plans with your team for each priority area, including steps to improve and timelines for implementation.
5. Use the additional notes section to jot down any recommendations or insights from your analysis.

Note: It's important to periodically review and update this workbook to track progress and adjust strategies as needed.

SECTION 1: WEBSITE METRICS

Website Page Speed Insights (Record Report Score):

USE THIS TOOL TO PERFORM THIS TEST

<https://pagespeed.web.dev/>

	Mobile	Desktop
Performance:	<input type="text"/>	<input type="text"/>
Accessibility:	<input type="text"/>	<input type="text"/>
Best Practices:	<input type="text"/>	<input type="text"/>
SEO:	<input type="text"/>	<input type="text"/>

Comments/Notes:

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Mobile Responsiveness (1-10):

Score: Don't Know:

Comments/Notes:

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Google Business Profile Optimization (1-10):

Score: Don't Know:

Comments/Notes:

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Google Review and Response Strategy (1-10):

Score: Don't Know:

Comments/Notes:

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Content Marketing (Blog) Strategy (1-10):

Score: Don't Know:

Comments/Notes:

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User Experience (1-10):

Score: Don't Know:

Comments/Notes:

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Website Design and Navigation (1-10):

Score: Don't Know:

Comments/Notes:

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Clear Calls to Action for the User (1-10):

Score: Don't Know:

Comments/Notes:

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SECTION 2: SEO ANALYSIS

Keyword Research and Implementation (1-10):

Score: Don't Know:

Comments/Notes:

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On-Page SEO (Title tags, meta descriptions, headings) (1-10):

Score: Don't Know:

Comments/Notes:

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Content Quality and Relevance (1-10):

Score: Don't Know:

Comments/Notes:

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Backlink Profile (Quality and Quantity) (1-10):

Score: Don't Know:

Comments/Notes:

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SECTION 3: ACTION PLAN FOR IMPROVEMENT

Using the Answers Above, Write Down Your Top Priority Areas for Improvement:

Action 1: Top Priority

Steps to Improve:

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Action 2: What is Your Timeline to Improve These Areas

Steps to Improve:

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Action 3: Are You Able to Remedy These Areas for Improvement, or Will You Need Outside Help

Steps to Improve:

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Based on Question 1 from Section 2, Do You Know What Keywords You're Ranking for and Your Keyword Ranking:

Yes No

Additional Notes and Recommendations:

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SECTION 4: KEYWORD RANKING REPORT AND FULL WEBSITE AUDIT

NOTE: This information will be provided by Hero Marketing Agency at the completion of your website audit and local market keyword ranking report. Our team will review this information with your HVAC business, so all parties are clear on the baseline report, and goals with your new marketing plan.

Now let's move on to Exercise #4.

EXERCISE 4: The last and final exercise we will go through in your HVAC Playbook for Record Setting Growth involves measuring your KPIs (Key Performance Indicators) and how they impact your company and marketing strategy.

What are you measuring and what do you need to improve on?

Revenue Growth: Are you measuring the increase in overall revenue over a specific time period?

Yes No

Profit Margin: Do you know the percentage of profit your company makes from its revenue?

Yes No

Customer Satisfaction: Do you have satisfied customers and are they leaving consistent positive reviews for your business on Google?

Yes No

Customer Acquisition Cost (CAC): Do you know the cost of acquiring a new customer?

Yes No

Customer Lifetime Value (CLV): Do you know the total value a customer brings to your company over their entire relationship?

Yes No

Churn Rate: Are you able to identify the number of customers who stop using your product or service over a given period?

Yes No

Net Promoter Score (NPS): Do you know your customer loyalty and satisfaction based on the likelihood of customers recommending your company?

Yes No

Employee Satisfaction/Engagement: Assesses the satisfaction and engagement levels of employees.

Great Good Bad Don't Know

Cost of Goods Sold (COGS): Do you know the direct costs of goods for your services?

Yes No

Return on Investment (ROI): Do you know the ROI on your organic and paid marketing efforts?

Yes No

Market Share: Do you know your current percentage of market share you're your company controls?

Yes No

Conversion Rate: Do you know the percentage of visitors who take a desired action, such as making a purchase, or using your contact form, and how many you are converting online with your website, Google Business Profile page, and also with your paid marketing efforts?

Yes No

Quality Metrics: Have you had an audit of the quality of products or services and how they compare to the competition?

Yes No

Brand Awareness: Do you know how well your brand is recognized and remembered by the target audience?

Yes No



BOOM! YOU ARE DONE!

PUTTING THIS ALL TOGETHER: MARKETING PLAN IMPLEMENTATION STEPS

Implementing the results and data from your HVAC Playbook for Record Setting Growth is the crucial step where we bring your well-crafted strategies and tactics into action using the information you've learned through this Playbook. This is the phase where our marketing team and your in-house team execute your marketing activities to reach your target audience and achieve your growth objectives.

Remember: I cover this step in great detail throughout chapter 6 of The Marketing Revolution.

Here's a closer look at the key aspects of implementing your marketing plan:

Execute Your Tactics: We first start by executing the specific tactics outlined in your playbook. This may involve launching advertising campaigns, creating content, implementing SEO strategies, optimizing your Google Business Profile, creating a review management strategy, engaging in social media activities, or conducting email marketing, among other tactics. Each tactic should align with your overall marketing strategies and target the identified audience segments.

Assign Responsibilities: Clearly define roles and responsibilities for each marketing activity (both external with Hero Marketing, and internal with your team) to ensure smooth execution and accountability. Having a well-organized structure and clear communication channels will help keep everyone accountable and ensure that tasks are completed in a timely manner.

Set Timelines and Milestones: Establish timelines and milestones for each marketing activity to keep the implementation on track. This step is critical for accountability to monitor progress, identify any potential delays or issues, and make adjustments as needed. Breaking down your marketing plan into smaller, manageable tasks with specific deadlines will enhance efficiency and productivity. Please note: Our agency keeps track of all steps using our Asana task management software system, and you will be in continual communication with our Client Strategist to ensure success on all fronts.

Monitor and Track Performance: Continuously monitor and track the performance of your marketing activities. Utilize key performance indicators (KPIs) relevant to each tactic and align them with your marketing objectives. This will enable you to evaluate the effectiveness of your strategies, identify areas of improvement, and make data-driven decisions.

Accountability: Attend your monthly strategy Zoom calls with Hero Marketing to review data and make adjustments as necessary. By consistently evaluating the outcomes of your marketing efforts, we will make necessary modifications to optimize results.

Adapt and Adjust: As we implement your marketing plan, be open to adjustments and adaptations based on the insights and feedback you receive, and what the data is telling us. Market dynamics and customer preferences may change, so we will be prepared to refine your strategies and tactics accordingly.

Measure Return on Investment (ROI): Our team will assess the return on investment of your marketing activities by analyzing the impact they have on your business goals. We will track and share metrics such as sales revenue, customer acquisition cost, new jobs booked, source of new leads, website traffic, engagement rates, and conversion rates to name a few. This will help you gauge the effectiveness of your marketing efforts and allocate resources to the most profitable activities.

Communication and Collaboration: Foster effective communication and collaboration with our marketing agency and across other departments. Regularly share progress updates, insights, and results to keep everyone informed and aligned with the overall marketing objectives. Encourage open communication channels for feedback, ideas, and suggestions to continuously improve your marketing implementation.

Adapt to Feedback: Actively seek feedback from customers, target audience, and internal stakeholders. Analyze their responses and adjust your marketing tactics accordingly. Pay attention to customer preferences, market trends, and industry insights to stay relevant and responsive to changing needs.