[LOGO]

[COMPANY NAME]

Business Plan

[DATE]

[YOUR NAME, JOB TITLE]

[ADDRESS]

[PHONE] **|** [EMAIL]

[WEBSITE]

# Executive Summary

## Company History

*[Summarize your company*’*s history and how you got to this point.]*

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| **EXAMPLE**  Get Some Air started in 2012 as a mom-and-pop air conditioning repair business. Co-founders Cindy and Paul had both worked in the trades for over a decade—Paul as a licensed HVAC mechanic and Cindy as an electrician. When the couple’s first baby was born, they were in a tight spot: their jobs couldn’t accommodate the time they needed time to look after their child.  Cindy and Paul started Get Some Air so they could control their schedules, have more flexible working hours, and continue doing what they love. Cindy scoured her friends and family to find their first few customers. In two months, Paul had serviced three happy customers, and Cindy registered their business name.  Today, Get Some Air is a growing company with a full list of HVAC services, two additional employees, and more than 50 five-star reviews. |

## Mission, Vision & Values

*[Describe why your business exists, what you want it to become, and what qualities are important to you.]*

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| **EXAMPLE**   * **Our mission:** To give customers an exceptional experience. * **Our vision:** To be the most in-demand HVAC business in Maryland. * **Our values:** Honesty, Quality, Timeliness, Collaboration, Client Experience |

## Business Goals

*[List the business goals that you want to achieve this year. Include a way to measure success.]*

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| **EXAMPLE**  In 2022, Get Some Air will:   * Hire one additional employee * Purchase a second company van * Get 15 new quarterly HVAC maintenance clients * Reach $150,000 in revenue |

## Competitive Advantage

*[Describe what makes you different from any other HVAC business in your area.]*

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| **EXAMPLE**  Get Some Air is the only HVAC company in Baltimore, Maryland, that puts customer happiness above all else. We do it right the first time, and if a client is ever unsatisfied, we work with them to fix the issue. |

# Business Overview

*[Describe the services you offer, where, who you work with, and what type of business structure you have. List any assets and startup costs associated with the business.]*

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| **EXAMPLE**  Get Some Air is a partnership that provides air conditioning and heating services to residential clients in Baltimore, Maryland.  Get Some Air operates out of owners Cindy and Paul's home garage. The company owns:   * 2 multimeters * 3 handheld thermometers * 4 sets of services wrenches, metal shears, hammers, and drills * 1 van * 3 sets of PPE * 1 laptop, 1 tablet, and 1 printer |

# Company Services

*[List the services you provide and how often.]*

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| **EXAMPLE**  Get Some Air provides residential air conditioning, heating, and ventilation services. As of fall 2022, Get Some Air will also service multi-zone HVAC systems for customer homes.  Clients are able to customize their service schedules as needed. |

# Service Pricing

*[List your pricing, whether that*’*s hourly, per service, or a flat fee.]*

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| **EXAMPLE**  Each job receives a custom estimate and job rate depending on system needs. On average, Get Some Air charges:   * $150/hour for diagnostics * $200-275 for central air conditioning system repairs * $315 for furnace repairs * $35/vent for duct cleaning |

**Extra Reading:** [Pricing your HVAC services](https://academy.getjobber.com/how-to-price-hvac-jobs/)

# Market Analysis

## Client Demographics

*[Describe your ideal client, including demographics, price point, and buying behavior.]*

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| **EXAMPLE**  Get Some Air’s ideal client fits into these demographics:   * Baltimore area residents * Household income of $55,000+ * Ages 25–65 (working professionals with limited handywork experience) |

## Competitor Analysis

*[Identify local competitors, what they do well, and where they can improve. Include as much detail as you can.]*

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| **EXAMPLE**   * **Air Connoisseur** is a state franchise that services and sells HVAC equipment, so clients can work with one business for all their cooling and heating needs. However, Air Connoisseur doesn’t send on-my-way texts or service follow-ups like Get Some Air. * **Vinny’s Furnace Repair** is a well-known local HVAC service provider that’s served Baltimore since 1999. They work quickly but often receive negative reviews about poor attention to detail. * **Full Blown HVAC** does excellent work and has lots of advertisements all over Baltimore. They have a long waiting list and charge high prices, so clients find it hard to get onto the company’s schedule and have to pay a premium for service. |

# Marketing & Sales

*[List your current sales and marketing tactics, as well as any new ones you*’*ll be using this year.]*

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| **EXAMPLE**  Get Some Air already uses these marketing tactics:   * Word of mouth (client reviews and referrals) * Facebook advertising * Google Search and Local Services Ads   In the upcoming year, the company will also begin using:   * **Postcard mailers to newly developed neighborhoods.** Many movers and new homeowners need home improvement contractors, so these mailers will offer initial HVAC installation and a special rate on weekly maintenance.   + **COST:** $940 to design, print, and distribute 500–1,000 postcards by zip code * **Email marketing.** This will help inform clients of maintenance discounts, contract renewal dates, and price increases. Email list subscribers will also receive useful content about not only HVAC and energy management, but other home maintenance tips as well.   + **COST:** Free email distribution platform + 2 hours of Cindy’s time each week   Get Some Air doesn’t have a dedicated sales team. However, each employee is trained to give a sales pitch to anyone who has questions about their service. |

**Extra Reading:** [HVAC business marketing ideas](https://academy.getjobber.com/resources/articles/hvac-marketing/)

# Employee Planning

*[List all employee wages in line with local rates, number of employees, and hiring costs, as well as jobs per day and revenue per job.]*

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| **EXAMPLE**  Cindy and Paul are currently interviewing for a new full-time, licensed HVAC technician.  This new hire will allow for a second service team. Get Some Air will then have the capacity to meet our goal of 15 new quarterly HVAC maintenance clients. Assuming a conservative $350/job, these 15 new clients will bring in $21,000 in annual revenue.  Employee Salaries:   * Owner: $53,000 * Crew Leader: $45,000 * Crew Member: $39,000 * New Hire: $34,000   **TOTAL PAYROLL BUDGET: $171,000** |

# Financial Planning

*[Include your business model, any funding or loans, operating costs, sales projections, profit-loss and cash flow statements, and any other relevant financial statements.]*

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| **EXAMPLE**  2021 Monthly Recurring Revenue (MRR): $6,300  2021 Annual Revenue: $75,600  Projected 2022 MRR: $13,000  Projected 2022 Revenue: $156,000  2022 Budget:   * Payroll: $96,000 * Vehicles and equipment (loan payments, maintenance): $15,000 * Fuel (including second vehicle): $15,000 * Insurance: $2,150 * Marketing: $6,000 * Hiring and training: $5,000 * Software subscriptions (Jobber, QuickBooks Online): $850 * Miscellaneous (e.g., phone plan, office supplies, incidentals): $5,000   **TOTAL 2022 BUDGET: $145,000** |