

CASE STUDY – TECHNICAL BUSINESS 1

From the Business Running YOU, to YOU running the business

An HVAC business that has been open for 1 ½ years. The owner did everything and had phone service to answer any incoming calls. Has over 10 years' experience in the industry and only wanted to take care of servicing HVAC, not selling or installing. He was spending \$2,000 on social media ads and was getting 1-2 leads a week from them. The website was static and said the same thing as every other HVAC business. Did not know any of his financial numbers. Stated that he provides a bid for a project and never hears back from anyone. If they do call back, it's 4 months later, and they want to negotiate his fee. Uses an Excel spreadsheet for his CRM.

In 6 months:

- He had a CRM system installed, and he began to use it.
- His spouse transferred all his spreadsheet data into the CRM. Found \$20,000 in past due accounts by doing this. He did collect \$13,000, turned the rest over to collections.
- Hired a CPA to input the data, produce reports, and file his taxes (never filed), which ended up saving him money.
- Developed multiple joint ventures with other owner/operator HVAC companies to split out the work based on everyone's skills. Now, he could take on more jobs.
- Increase his prices, due to the new relationships, which lead to an increase in profits.
- Changed the verbiage on his social media ads and applied targeting, which led to receiving 5-10 leads a day.
- Bartered to have his website updated and a scheduling program installed, which led to more booked appointments.
- Had an attorney draft an agreement for his business, take down payments before the job starts, and receive the balance when the project was completed.
- We changed his bidding process and put in incentives for fast decisions, which almost eliminated all the tire kickers.
- Started to enjoy his business instead of dreading going to work every day.

Would you like to know the kind of results we can get for you in your business?

Then contact us today for an introduction call. <https://calendly.com/sfeld/30min>

QUOTE: "I cannot thank Steve enough. He showed me how to manage and run my business. Now, I have a clear path to grow. Steve is great to work with."