



# Jordan **WORX**

## HVAC BUSINESS BUILDERS

Not Just Advice. **We Build It With You.**

# LICENSED TO **LAUNCH**

## How to Start Your HVAC Company the Right Way

A short, practical step-by-step guide for new HVAC business owners on what to set up first, what to avoid, and how to launch with confidence.



### LEGAL SETUP

Structure the business and get compliant



### SYSTEMS

Put your phone, software, and payments in place



### MARKETING

Create the brand assets and lead flow you need



### LAUNCH

Open the doors with a solid foundation



# FREE QUICK-START GUIDE



— Not Just Advice. **We Build It With You.** —

LICENSED TO LAUNCH

HVAC STARTUP QUICK-START GUIDE

# YOU EARNED THE LICENSE. NOW YOU HAVE TO BUILD THE COMPANY.

Technical skill gets you in the game. Business systems determine whether you stay there.

**Knowing how to diagnose, repair and install HVAC equipment is not the same as knowing how to build a profitable HVAC company.**

PRICING

PHONE

SCHEDULING

PAYMENTS

FINANCING

BOOKKEEPING

MARKETING

COMPLIANCE



## A NOTE FROM LEONARD

*"When I opened my first HVAC company in 1993, nobody handed me the right order of operations. I learned it through trial, expensive mistakes and years of building HVAC companies from the ground up. This guide shows you the size of the launch - not every answer."*

Leonard Jordan | Founder, JordanWORX HVAC Business Builders

**YOUR LICENSE LETS YOU DO THE WORK.  
YOUR FOUNDATION DETERMINES WHETHER THE BUSINESS WORKS.**



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# THE COMPLETE LAUNCH PICTURE

Getting licensed is one box. Building the company behind the license is the real project.

## 1 LEGAL + MONEY

- Business structure
- Name registration
- EIN and tax setup
- Contractor licensing
- Local permits
- Insurance coverage
- Business banking
- Bookkeeping system
- Startup budget
- Cash reserve
- Tax handling
- Owner pay plan

## 2 OPERATIONS

- Business phone
- Call routing
- Professional email
- CRM setup
- Scheduling
- Dispatch
- Customer records
- Estimates
- Work orders
- Invoicing
- Credit cards
- Consumer financing
- Warranty process
- Supplier accounts
- Truck inventory

## 3 PRICING + PROFIT

- Service-call fee
- Repair pricing
- Maintenance pricing
- Replacement pricing
- Labor burden
- Material markup
- Overhead recovery
- Gross-profit targets
- Net-profit targets
- Job costing
- Cash-flow tracking
- Financial reports

## 4 BRAND + CUSTOMER FLOW

- Market position
- Company name
- Logo and colors
- Website
- Google profile
- Service pages
- Social pages
- Review process
- Postcards
- Door hangers
- Lead tracking
- Phone scripts
- Confirmations
- Sales presentation
- Follow-up

**AND EVERY ONE OF THESE PIECES MUST WORK TOGETHER.**



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# WHAT HAPPENS WHEN ONE PIECE IS MISSING?

The damage usually shows up after you have already spent the money.

X

## NO PROFITABLE PRICING

You stay busy, collect money and still wonder why nothing is left.

X

## NO PHONE SYSTEM

Paid leads die in voicemail, missed calls and slow follow-up.

X

## NO FINANCIAL CONTROLS

Cash in the bank feels like profit until taxes and bills arrive.

X

## NO CUSTOMER PROCESS

Every customer receives a different experience depending on the day.

X

## NO MARKET POSITION

You become another contractor forced to compete mainly on price.

X

## NO LAUNCH SEQUENCE

You spend too much, too soon - then pay again to rebuild it correctly.

**MOST LAUNCH FAILURES ARE BUSINESS-SETUP FAILURES,  
NOT TECHNICAL FAILURES.**





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# ARE YOU ACTUALLY READY TO LAUNCH?

Answer YES only when the system is in place and has been tested.

☐ Do you know exactly which services you will offer first?

☐ Have you chosen a focused, profitable service territory?

☐ Do you know your true monthly operating cost?

☐ Are your prices built from your own numbers?

☐ Is your business phone answered professionally?

☐ Can every call and lead be tracked?

☐ Can customers approve estimates electronically?

☐ Can you accept cards and offer financing?

☐ Is your bookkeeping system operational?

☐ Does your website work correctly on a phone?

☐ Is your Google Business Profile set up correctly?

☐ Do you have a repeatable review-request process?

☐ Have you tested the complete customer experience?

☐ Do you know what to buy now - and what can wait?

☐ Do your systems communicate with one another?

☐ Do you have a launch plan tied to your available cash?

IF YOU ANSWERED "NO" OR "NOT SURE" MORE THAN THREE TIMES:

**YOU DO NOT HAVE A TECHNICAL PROBLEM.  
YOU HAVE A LAUNCH-PLAN PROBLEM.**

# SO... WHAT SHOULD YOU DO FIRST?

That is where the real cost – and the real value – of a launch plan begins.

- 1 What must be completed before the first customer call?
- 2 What can safely wait until revenue begins coming in?
- 3 What should be outsourced instead of built from scratch?
- 4 What should never be purchased without a plan?

The right order depends on your market, budget, licensing status, service mix, available cash and target launch date. One decision made out of order can burn cash, create rework or lock you into the wrong systems.

**DETAILS MATTER**

**PRICING FORMULA**

Your cost structure and profit targets

**DETAILS MATTER**

**SYSTEM STACK**

Phone, CRM, payments and financing

**DETAILS MATTER**

**VENDOR DECISIONS**

What to buy, what to skip and when

**DETAILS MATTER**

**LAUNCH SEQUENCE**

The exact order tied to your cash

**34+ YEARS OF HVAC BUSINESS-BUILDING EXPERIENCE CAN SAVE MONTHS OF TRIAL AND ERROR.**



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**YOUR NEXT STEP**

HVAC STARTUP QUICK-START GUIDE

# YOU HAVE THE LICENSE. LET'S BUILD THE BUSINESS BEHIND IT.

## FREE 30-MINUTE HVAC LAUNCH STRATEGY CALL WITH LEONARD

Bring your questions. Get practical direction on what to do first, what can wait and which expensive launch mistakes to avoid.

- ✓ Identify your next three priorities
- ✓ Expose major gaps in your launch plan
- ✓ Protect your startup cash
- ✓ See how JordanWORX can help you launch faster

**BOOK YOUR CALL AT JORDANWORX.COM**

**(321) 534-8700**

**info@JordanWORX.com**

**NOT JUST ADVICE. WE BUILD IT WITH YOU.**



**Leonard personally leads every call.**

34+ years building, repairing and growing HVAC companies.

**FREE. 30 MINUTES.  
NO OBLIGATION.**

General educational information only. Licensing, tax, insurance and permit requirements vary by location. Verify requirements with the appropriate authorities and professional advisers.