HVAC Flowtomat

The HVAC Workflow Scorecard

A quick self-check for missed calls, estimate follow-up, dispatch pressure, and office handoff leaks.

For residential-heavy HVAC shops with real office complexity.

Most HVAC revenue leaks happen after the phone rings

A lot of residential HVAC shops assume the main problem is lead volume. Sometimes it is. But in many shops, the bigger issue is what happens after the lead comes in.

Calls get missed. Estimates sit too long. Dispatch gets overloaded. Membership follow-up slips. Field-to-office handoffs break.

None of this feels dramatic in the moment. But together, it creates quiet revenue loss, admin drag, and a lot of avoidable chaos.

This scorecard is a simple way to pressure-test whether your workflow is holding or leaking.

The 5 places HVAC workflow usually breaks

1. Missed Calls / Unbooked Demand

When inbound calls are missed or follow-up is inconsistent, demand leaks before it ever becomes a booked job.

2. Estimate Follow-Up Gaps

Quoted work often dies quietly when there is no reliable process for same-day and next-day follow-up.

3. Dispatch Overload

As volume rises, the dispatch board and office team start carrying too much complexity. Reschedules, gaps, and reactive decisions increase.

4. Membership / Maintenance Follow-Up Drift

Membership renewals, service reminders, and inactive-customer follow-up often depend on manual effort and get dropped when the office is busy.

5. Office-to-Field Handoffs

Notes, photos, next actions, and customer context do not always move cleanly between office staff, techs, comfort advisors, and install coordination.

Score your workflow

Give yourself 1 point for each statement that is consistently true in your shop. Write the score in the field beside each item.

Missed Calls / Unbooked Demand

Missed calls trigger same-day follow-up every time.	[__] 1
After-hours and overflow calls are handled consistently.	[__] 1
The office can quickly see which inbound opportunities were not booked.	[__] 1

Estimate Follow-Up

Unsold estimates are actively worked within 24-48 hours.	[__] 1
There is a clear owner for estimate follow-up.	[__] 1
The team can easily see which quoted jobs are aging without action.	[__] 1

Dispatch Overload

Dispatch load does not regularly cause dropped balls or reactive scrambling.	[__] 1
Reschedules and job updates are communicated cleanly to customers and techs.	[__] 1
The office has a consistent process when same-day volume spikes.	[__] 1