HVAC Business Plan Template

A blank business plan for a new HVAC shop. Fill in each field. Every field is blank until you complete it. Free from SimplyWise.

Executive summary

Business name	
Owner name and role	
Legal structure	
Mission in one sentence	
Services in one line	
Service area in one line	
Year-one revenue goal	

Services

Installation work offered	
Repair work offered	
Maintenance plans offered	
Residential or commercial focus	
Emergency call policy	
Labor warranty terms	

Service area

Home base ZIP code	
Travel radius in miles	
Towns or counties served	
Average drive time per call	
Nearby competitors	

Startup cost lines

Licenses and permits	
Insurance	
Tools and gauges	
Refrigerant recovery equipment	

Vehicle or van	
Software and phone	
Website and printed materials	
Accountant and lawyer	
Working cash reserve	

Pricing method

Target hourly billing rate	
Wage per hour	
Payroll cost per hour	
Overhead per hour	
Parts markup percent	
Trip charge	
Minimum job price	
Flat rate or time and material	

Year-one forecast

Monthly fixed costs	
Average job price	
Variable cost per job	
Break-even jobs each month	
Jobs goal for month 12	

Marketing

Main way customers find you	
Google Business Profile status	
Maintenance plan offer	
Referral plan	
Monthly marketing budget	

Licensing and insurance checklist

State or local contractor license	
EPA Section 608 technician certification	

General liability insurance	
Workers compensation insurance	
Commercial vehicle insurance	
Business registration	
Date each item was completed	

Line items

Month	Jobs booked	Average job price	Revenue	Variable costs	Fixed costs	Profit or loss
Month 1						
Month 2						
Month 3						
Month 4						
Month 5						
Month 6						
Month 7						
Month 8						
Month 9						
Month 10						
Month 11						
Month 12						

Each startup cost line also has a one-time or monthly mark and an amount cell.

Worked example (made-up inputs, not market prices): startup total is 1,200 + 3,600 + 4,500 + 9,000 + 600 + 1,500 + 12,000 = 32,400 dollars.

Worked example billing rate: wage 29.33 (BLS OEWS May 2025 national median, employees only) + payroll 8.00 + overhead 12.00 = 49.33 cost per hour. A 25 percent markup is 12.33. Billing rate is 61.66 dollars an hour.

Worked example break-even: fixed costs 4,000 divided by (400 average job price minus 250 variable cost) = 26.67, so 27 jobs a month.

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