

Marketing Blueprint

Sample HVAC Company

Creating Value Through Education, Experience &
a Done Right Promise

What's Inside

A comprehensive strategic plan designed to establish Our Company as the trusted HVAC expert in Hendricks County.

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TERRITORY

Hendricks County, IN

STAGE

New Franchise (2025)

REVENUE TARGET

$500K Year 1

CURRENT MONTHLY RUN RATE

~$46–50K

PRIMARY GAP

Call Volume & Brand Awareness

Executive Summary: The Challenge

Our Company has entered one of the most competitive HVAC markets in central Indiana — a landscape dominated by large, well-funded regional players whose aggressive marketing budgets and fleet visibility create a formidable awareness advantage.

The core challenge is not one of service quality. Owner and his team deliver a demonstrably superior customer experience, built on a structured 10-step process, transparent pricing, and a genuine commitment to education over sales pressure. The challenge is one of **reach and recognition**: getting in front of the right homeowners before they default to a familiar competitor name.

The Opportunity

The Market Is Ripe for a Trust-Based Alternative

The dominant competitors in this market — Peterman Brothers and Williams Comfort Air — have built their brands on volume and visibility, but have accumulated significant reputational baggage around high-pressure sales tactics and oversized repair bills. Customer complaints about these providers are a consistent theme in local community forums and review platforms.

This creates a clear and defensible positioning opportunity: **Our Company as the trusted, education-first HVAC expert** that Hendricks County homeowners have been looking for.

Targeted Outcomes

- **Increase monthly call volume by 40–60% within 90 days**
- **Grow maintenance plan revenue from 5% to 15% of total revenue**
- **Build a systematic referral engine that converts satisfied customers into active brand advocates**
- **Establish AireServ as the "go-to" HVAC name in Avon, Plainfield, and Brownsburg neighborhoods**

Ideal Client Profiles (ICP)

Who We Are Targeting in Hendricks County

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Based on Our Company's corporate research and local market dynamics, three distinct Ideal Customer Profiles have been identified for the defined territory. Each profile represents a homeowner segment that values quality, transparency, and professional service — and is willing to pay a premium for it.

ICP 1: The Established Family

Ages:	35–50
HHI:	$80K–$150K

Busy dual-income households with school-aged children. Value convenience, safety, and vetted professionals.

ICP 2: The Active Empty Nester

Ages:	55–70
HHI:	$100K–$200K+

Experienced homeowners who have been burned before. Prioritize trust, honest assessments, and long-term relationships.

ICP 3: The DINK Professional

Ages:	28–40
HHI:	$120K–$200K+

Dual-income, no-kids couples investing in smart home technology and long-term home efficiency.

ICP 1: The Established Family

Busy Homeowners Who Value Reliability & Safety

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PSYCHOGRAPHIC PROFILE

This ICP is time-constrained and overwhelmed by home maintenance. They value convenience above all else — they need a company that shows up when promised, communicates proactively, and gets the job done right the first time. With children in the home, indoor air quality and the safety of the technicians entering their space are top concerns. They are highly responsive to education about how HVAC systems affect their family's health.

DISCOVERY PATHS

Google emergency searches, Nextdoor recommendations, local Facebook community groups, peer referrals from other parents at school or sports events.

Age Range	35–50
Household Income	$80,000 – $150,000
Household Type	Dual-income, school-aged children
Home Ownership	Owner-occupied, suburban Hendricks County
Home Value	$250,000 – $450,000
Gender Skew	Slight female skew for initial research; joint decision for major purchases

ICP 1: The Buying Journey

How The Established Family Finds & Chooses AireServ

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STAGE 1

AWARENESS

TRIGGER:

System failure during extreme weather, or a neighbor mentioning their HVAC company.

CHANNEL:

Google search ("AC repair Avon IN"), Nextdoor post, Facebook community group.

STAGE 2

CONSIDERATION

ACTION:

Reads Google reviews, checks website, looks for photos of technicians and vans.

KEY QUESTION:

"Can I trust this person in my home with my kids here?"

STAGE 3

DECISION

ACTION:

Calls or books online. Evaluates response time and communication quality.

KEY QUESTION:

"Will they actually show up, and will they explain what's wrong?"

STAGE 4

EXPERIENCE

DELIGHT FACTORS:

Advance text notification, uniformed tech with booties, Good-Better-Best options explained clearly, handwritten thank-you note.

STAGE 5

ADVOCACY

TRIGGER:

Neighbor asks for HVAC recommendation on Nextdoor or Facebook.

ACTION:

Enthusiastically recommends AireServ by name.

Buying Triggers

System failure, seasonal tune-up reminders, indoor air quality concerns for children with allergies.

Buying Blockers

Perceived high cost of dispatch fee, uncertainty about whether repair or replace is the right choice, scheduling conflicts.



ICP 1 — Avatar Profile

Sarah M. | "The Busy Mom"

Age: 42 | Avon, Indiana

Occupation: Healthcare professional

Income: $130,000 combined

Home: 3-bed, 2,200 sq ft suburban

Family: Married, two school-aged children (one with seasonal allergies)

LIFESTYLE OVERVIEW

Sarah manages a demanding career while coordinating the family's schedule. Her home is her sanctuary, but maintaining it is a constant source of low-grade stress. She does not have time to wait around for a four-hour service window or deal with a company that doesn't call ahead.

PAIN POINTS

- Cannot take half a day off work for an HVAC appointment with no estimated arrival time
- Deeply frustrated by past experiences with technicians who were unprofessional or left a mess

KEY BUYING MOTIVATORS

- Predictable scheduling with a 20–30 minute advance text notification
- Uniformed, background-checked technicians who use booties and respect her home
- Clear explanation of indoor air quality options (air purifiers, filter upgrades)
- Online booking and text-based communication

PREFERRED INFO SOURCES

Nextdoor, local Facebook groups ("Avon Moms"), Google Reviews, word of mouth from other parents.

ICP 2: The Active Empty Nester

Experienced Homeowners Who Demand Trust & Transparency

Age Range	55–70
Household Income	$100,000 – $200,000+
Household Type	Empty nesters or recently retired
Home Ownership	Long-term owner, established Hendricks County resident
Secondary Properties	Many have a second home or travel seasonally
Gender Skew	Balanced; joint decision-making after careful consideration

PSYCHOGRAPHIC PROFILE

This ICP has experienced poor service in the past and carries a healthy skepticism toward HVAC companies. They have been oversold, pressured, and let down — and they are not going to make that mistake again. They value their time, demand honest assessments, and are looking for a "trusted advisor" relationship, not just a vendor. Once trust is established, they become extraordinarily loyal customers and enthusiastic referrers.

DISCOVERY PATHS

Word-of-mouth referrals from trusted neighbors or friends, Google reviews (they read them carefully), direct mail, community organizations (church, civic groups, golf club).

ICP 2: The Buying Journey

How The Active Empty Nester Finds & Chooses AireServ

Leadstra

STAGE 1

AWARENESS

TRIGGER:

System aging concerns, proactive maintenance reminder, or a trusted friend's recommendation.

CHANNEL:

Word of mouth, Google search, direct mail piece in neighborhood.

STAGE 2

CONSIDERATION

ACTION:

Reads reviews carefully, checks how long the company has been in business, looks for evidence of honesty and integrity.

KEY QUESTION:

"Are these people going to give me a straight answer, or try to sell me something I don't need?"

STAGE 3

DECISION

ACTION:

Calls and evaluates the quality of the phone interaction. Wants a clear explanation of the dispatch fee policy.

KEY QUESTION:

"Will they respect my time and my intelligence?"

STAGE 4

EXPERIENCE

DELIGHT FACTORS:

Technician who shows them the actual problem, explains repair vs. replace options honestly, leaves the home cleaner than they found it, sends a handwritten thank-you note.

STAGE 5

ADVOCACY

TRIGGER:

Neighbor mentions HVAC problems at a neighborhood gathering or community event.

ACTION:

Becomes an enthusiastic, unprompted referrer — "You have to call AireServ."

Buying Triggers

Aging system (10+ years), pre-travel maintenance check, proactive seasonal tune-up call from AireServ.

Buying Blockers

Fear of being oversold or pressured, concern about being "the new company in town" without a long track record.



ICP 2 — Avatar Profile

Bob & Carol H. | "The Snowbirds"

Ages: Bob 62, Carol 60 | Plainfield, IN

Occupations: Semi-retired engineer; Retired teacher

Income: $160,000

Home: 4-bed, 3,000 sq ft; own a lake house

Family: Three adult children, five grandchildren

LIFESTYLE OVERVIEW

Bob and Carol have worked hard for their comfortable life and take pride in their well-maintained home. They spend several months each year at their lake house and worry about their primary home's systems while they are away. They have been through enough HVAC companies to know exactly what they don't want: a technician who can't explain what's wrong, a salesperson who won't leave until they sign, or a company that fixes the symptom but not the root cause.

PAIN POINTS

- High anxiety about system failures (frozen pipes, complete breakdowns) when they are out of state
- Exhausted by the "churn and burn" approach of previous HVAC companies
- Frustrated by technicians who can't clearly explain what they found or why it matters

KEY BUYING MOTIVATORS

- A technician who acts like a "dog on a bone" to solve complex problems — won't give up until the root cause is found
- Smart thermostat options that allow remote monitoring when they are traveling
- A company that proactively calls them to schedule seasonal tune-ups before they leave for the lake
- The personal touch: a handwritten thank-you note from the owner goes a long way

PREFERRED INFO SOURCES

Trusted neighbor referrals, Google Reviews, Nextdoor, neighborhood newsletter.

ICP 3: The DINK Professional

An Emerging & High-Value Segment

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PSYCHOGRAPHIC PROFILE

This emerging segment is growing rapidly in Hendricks County as young professionals choose suburban communities for their first home purchases. They are research-driven decision-makers who invest in home quality and comfort. They think long-term — if they are planning to be in their home for 20 years, they want to make the right investment now. They appreciate premium service, smart home technology, and companies that communicate digitally.

DISCOVERY PATHS

Google search, Instagram, Facebook, online reviews (Google, Yelp), real estate agent referrals.

Age Range	28–40
Household Income	$120,000 – $200,000+
Household Type	Dual income, no children (DINK)
Home Ownership	First or second home purchase, often new construction
Tech Profile	Highly tech-savvy, digitally active
Gender Skew	Balanced



ICP 3 — Avatar Profile

David & Ashley R. | "The Smart Home Investors"

Ages: David 34, Ashley 32 | Avon, IN

Occupations: Software engineer; Marketing manager

Income: $185,000 combined

Home: 2,800 sq ft new construction

Family: Dual income, no children (DINK)

LIFESTYLE OVERVIEW

David and Ashley are intentional about every investment they make in their home. They researched their neighborhood for months before buying, and they approach home maintenance with the same analytical mindset. They are not looking for the cheapest option — they are looking for the best option, and they are willing to pay for it if the value is clearly explained.

PAIN POINTS

- Uncertainty about HVAC systems as relatively new homeowners
- Want to make smart long-term decisions (repair vs. replace analysis)
- Busy schedules; need convenient online booking and digital communication

KEY BUYING MOTIVATORS

- Smart thermostat and connected system options (Nest, Ecobee compatibility)
- Energy efficiency analysis and utility savings projections
- Clear explanation of system longevity and long-term ROI
- Online booking, text updates, and digital invoicing

PREFERRED INFO SOURCES

Google search, Instagram, online reviews, real estate agent referrals.

Key Buying Attributes

What Moves Hendricks County Homeowners to Choose Our Company

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These nine attributes represent the decision criteria that matter most to Our Company's target customers. They are ranked in order of importance based on the intake interview and market research.

01 Trustworthiness & Integrity

Customers have been burned by high-pressure tactics. Honest assessments and no-pressure options are the primary differentiator.

02 Effective Communication

Appointment confirmations, 20–30 min advance arrival texts, and status updates eliminate the #1 frustration of the service industry.

03 Technical Expertise & Education

Showing the customer the problem, explaining the "why," and walking through Good-Better-Best options builds confidence and closes sales.

04 Response Time & Availability

In an emergency, speed wins. 24/7 availability and same-day service are table stakes for premium HVAC customers.

05 Quality of Workmanship

Doing the job right the first time, fixing root causes rather than symptoms, and standing behind the work.

06 Professionalism & Appearance

Uniformed technicians, branded vehicles, booties on floors, and a clean workspace signal that this company takes pride in its work.

07 Maintenance & Follow-Up

Proactive seasonal tune-up reminders and ongoing relationship management keep AireServ top-of-mind between emergencies.

08 Local Community Connection

Locally owned and invested in Hendricks County — not a call center in another state, but a neighbor who cares about the community.

09 Education

Providing customers education about maintenance, their equipment, and service offerings.

Your Competition

Who Competes with AireServ in Hendricks County

Mowery Heating, Cooling & Plumbing

MAKEITMOWERY.COM | BROWNSBURG, IN

55+ years in business. 2026 Best of the Best Award for Customer Satisfaction (2nd year in a row). 4.9 stars on Google (1,971 reviews). Owner Chip Cochran cultivates a trustworthy, community-first persona. Services: HVAC, Plumbing, Hearth & Fireplace. 24/7 availability.

OUR ASSESSMENT

"The biggest locally owned competitor. The owner is kind of an 'aw shucks' type guy — trustworthy, good reputation."

Peterman Brothers

PETERMANHVAC.COM | INDIANAPOLIS, IN

$120M+ revenue, 40+ years in business. Family-owned. HVAC, Plumbing, Drains, Electrical. Voted 2024 Indy's Best HVAC Provider. 20,000+ 5-star reviews. Peterman Protection Club membership.

OUR ASSESSMENT

"Very expensive. Customers complain about high-pressure sales tactics and technicians pushing unnecessary upgrades."

Williams Comfort Air

WILLIAMSCOMFORTAIR.COM | INDIANAPOLIS, IN

Since 1966. 100 trucks, 150 technicians. HVAC, Plumbing, Electrical. 25,995+ reviews. 235,225+ homes served. 2025 Carrier President's Award.

OUR ASSESSMENT

"Very expensive. Customers see their vans everywhere but don't always feel like they get value for the ticket."

Kirby Heating & Air Conditioning

KIRBYHEATING.COM | PITTSBORO, IN

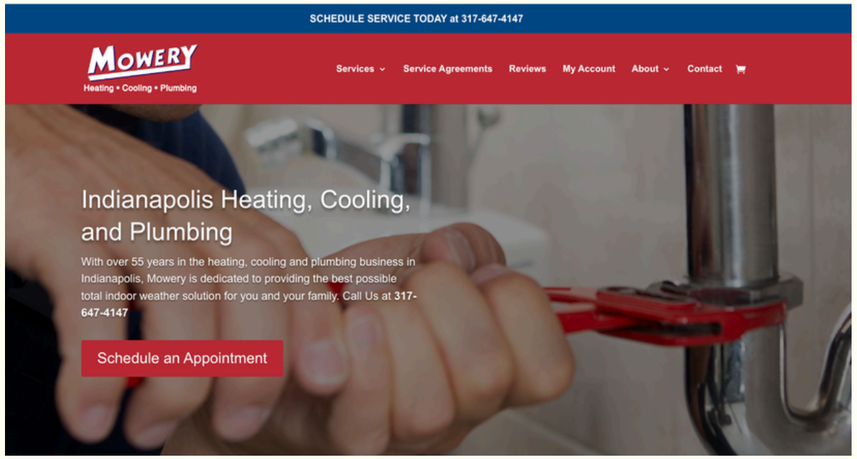
Serving Hendricks and surrounding counties since 1983. Locally owned, residential focus. Smaller operation with a loyal local customer base.

OUR ASSESSMENT

"A solid local player with a loyal following, but lacks the marketing scale and advanced service offerings of the larger regional competitors."

Competitor Marketing Analysis

How AireServ Compares on Key Buying Attributes



Indianapolis Heating, Cooling, and Plumbing

With over 55 years in the heating, cooling and plumbing business in Indianapolis, Mowery is dedicated to providing the best possible total indoor weather solution for you and your family.

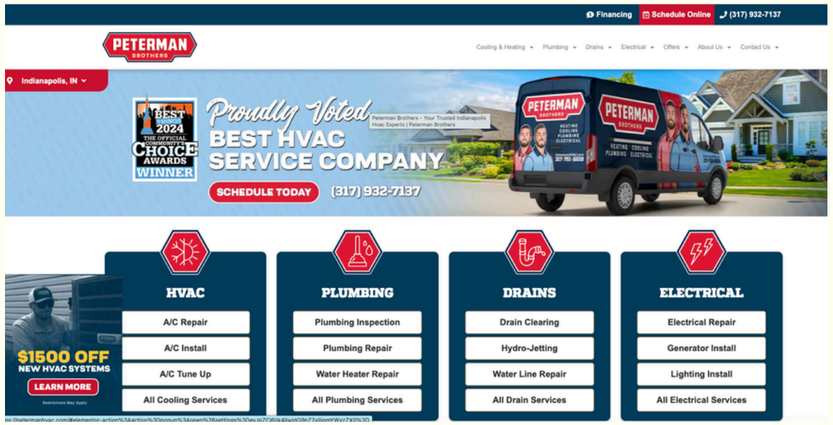
Summary:

- Plumbing focus
- Website seems dates (compared to others)
- High focus on experience and local (Indianapolis) presence

Attribute	Emphasis
Trustworthiness & Integrity	High
Effective Communication	Somewhat
Expertise & Experience	Very High
Response Time	High
Quality of Workmanship	High
Professionalism & Appearance	Somewhat
Maintenance & Follow Up	Somewhat
Local Community Connection	High
Education	Somewhat

Competitor Marketing Analysis

How AireServ Compares on Key Buying Attributes



Services built on 40+ years of experience

Midwest's expert HVAC, Plumbing, and Electrical Services

We remain dedicated to serving our community with the highest expertise and professionalism. From fixing a leaky faucet to installing a new furnace, you can count on Peterman Brothers professionals to make your experience the best.

Summary:

- Very busy website.
- Focus on brothers (cartoonish).
- Appeals on pricing (coupons) and comprehensive service offerings. Community focused video, not local however

Attribute	Emphasis
Trustworthiness & Integrity	High
Effective Communication	Somewhat
Expertise & Experience	High
Response Time	Somewhat
Quality of Workmanship	High
Professionalism & Appearance	Somewhat
Maintenance & Follow Up	Somewhat
Local Community Connection	High
Education	Low

Competitor Marketing Analysis

How AireServ Compares on Key Buying Attributes



Need Reliable, Honest Heating & Air Conditioning Service in Greater Indianapolis?

We are the premier central Indiana heating, air conditioning, plumbing and electrical company. Experience upfront pricing and true comfort by booking a trusted technician from Williams Comfort Air today!

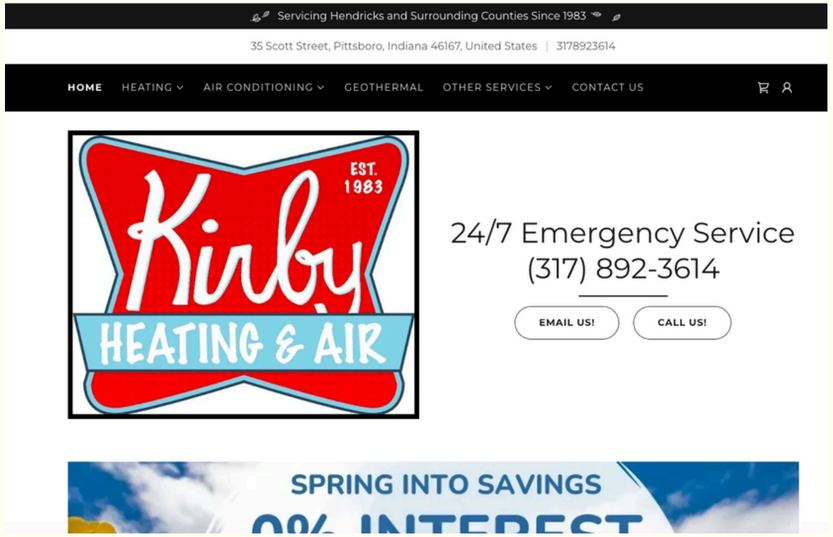
Summary:

- Lots of services. Well built website with unique coloring
- Customer focus with educational elements.
- Low focus on community and effective communication

Attribute	Emphasis
Trustworthiness & Integrity	High
Effective Communication	Low
Expertise & Experience	High
Response Time	Somewhat
Quality of Workmanship	High
Professionalism & Appearance	Somewhat
Maintenance & Follow Up	Somewhat
Local Community Connection	Low
Education	High

Competitor Marketing Analysis

How AireServ Compares on Key Buying Attributes



Reliable HVAC Professionals

Whether you need a maintenance check or an emergency repair on a heating or cooling unit, we are available to handle all of your heating, cooling, and ventilation needs.

Summary:

- Low quality website - very little information
- Focus on pricing - coupons
- Local focus - Servicing Hendricks and Surrounding Counties
- Educational info on sub pages

Attribute	Emphasis
Trustworthiness & Integrity	Low
Effective Communication	Low
Expertise & Experience	Somewhat
Response Time	Somewhat
Quality of Workmanship	Low
Professionalism & Appearance	Low
Maintenance & Follow Up	Somewhat
Local Community Connection	High
Eduation	Somewhat

Competitor Marketing Analysis

Comparing All Firms

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Attribute	Mowery Heating • Cooling • Plumbing	Peterman Brothers	Williams Comfort Air Heating • Cooling • Plumbing • Electrical	Kirby Heating & Air	AireServ Heating & Air Conditioning
Trustworthiness & Integrity	High	High	High	Low	High
Effective Communication	Somewhat	Somewhat	Low	Low	Somewhat
Expertise & Experience	Very High	High	High	Somewhat	High
Response Time	High	Somewhat	Somewhat	Somewhat	Somewhat
Quality of Workmanship	High	High	High	Low	High
Professionalism & Appearance	Somewhat	Somewhat	Somewhat	Low	High
Maintenance & Follow Up	Somewhat	Somewhat	Somewhat	Somewhat	Somewhat
Local Community Connection	High	Somewhat	Low	High	High
Education	Somewhat	Low	High	Somewhat	Somewhat

Where the Market Has Left the Door Open

Three Key Opportunities for Our Company

While competitors dominate through sheer volume and advertising spend, their operational models have created significant vulnerabilities. Our Company can capture market share by exploiting these three specific gaps.

Education-First Approach

THE COMPETITOR FAILURE

Technicians act as high-pressure salespeople, pushing expensive replacements without explaining the "why."

THE AIRESERV OPPORTUNITY

Position technicians as educators and trusted advisors. By showing the customer the problem and explaining Good-Better-Best options transparently, Our Company builds immediate trust and disarms skepticism.

Unwavering Integrity

THE COMPETITOR FAILURE

A reputation for "churn and burn" tactics, hidden fees, and prioritizing ticket size over customer needs.

THE AIRESERV OPPORTUNITY

Lean heavily into the "Done Right Promise." Flat-rate pricing, honest assessments (repair vs. replace), and a commitment to doing the right thing even when it means a smaller immediate sale.

Relationship Management

THE COMPETITOR FAILURE

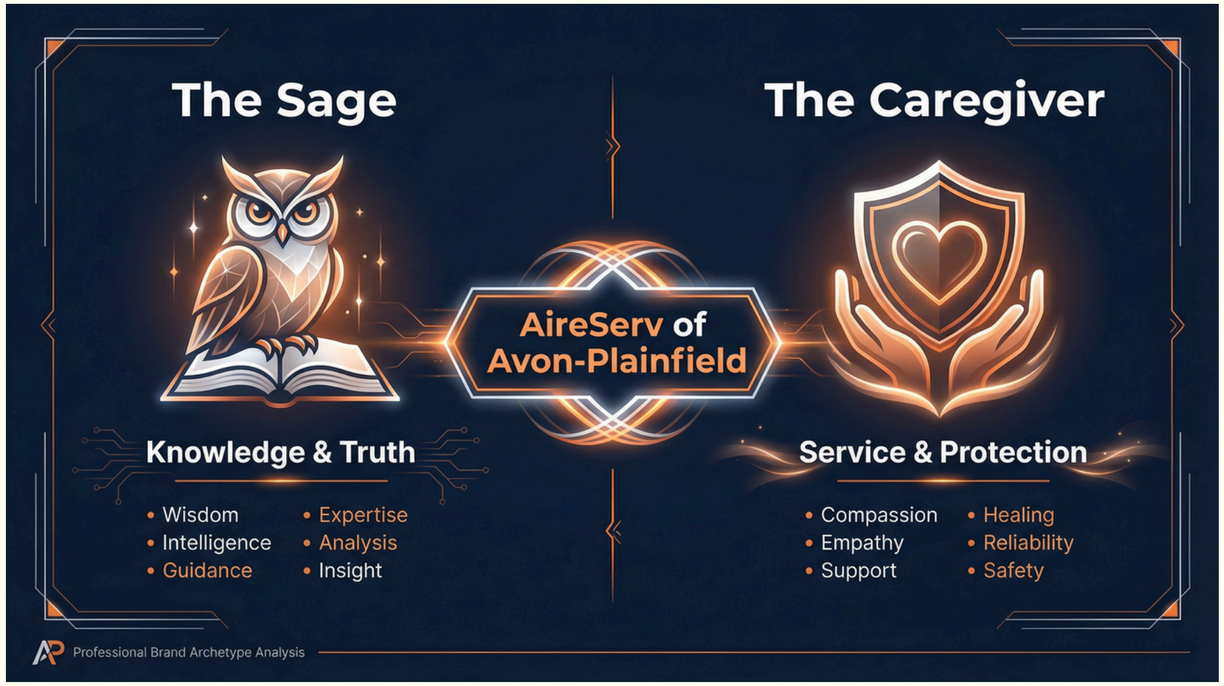
Treating customers as one-time transactions. Only communicating when there is an emergency or a hard sell.

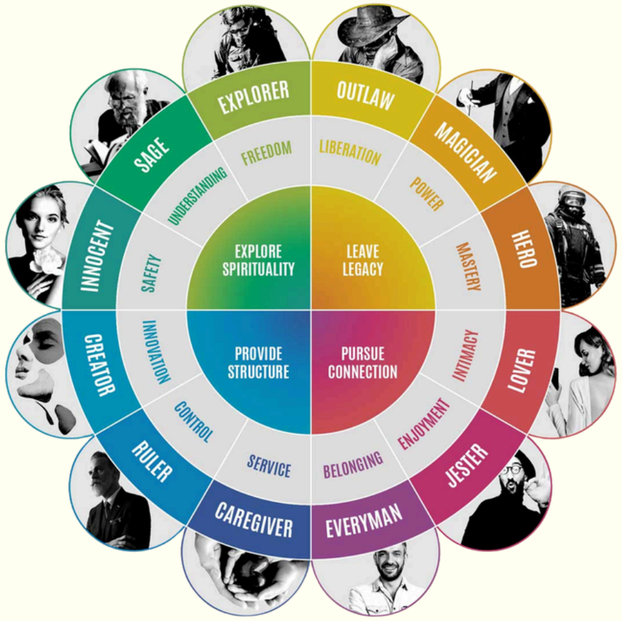
THE AIRESERV OPPORTUNITY

Build a systematic referral engine and proactive maintenance program. Stay top-of-mind through educational content, seasonal reminders, and personal touches like handwritten thank-you notes.

Brand Voice & Archetype

The Sage Meets The Caregiver





THE SAGE
(EXPERTISE & EDUCATION)

The Sage seeks truth and uses information to understand the world. Our Company embodies the Sage by diagnosing root causes rather than just treating symptoms. You educate homeowners, explain the "why" behind complex HVAC issues, and empower them to make informed decisions without sales pressure.

THE CAREGIVER
(EMPATHY & PROTECTION)

The Caregiver is driven by compassion, generosity, and a desire to help others. Our Company embodies the Caregiver by respecting the customer's home (using booties, maintaining a clean workspace), prioritizing family safety (background-checked technicians), and providing ultimate peace of mind.

Brand Positioning

The Trusted HVAC Expert Without the Pressure

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CORE POSITIONING STATEMENT

"Our Company is the trusted, education-first HVAC expert that Hendricks County homeowners rely on for honest assessments, transparent pricing, and professional service without the high-pressure sales tactics."

Education First, Sales Second

We believe an informed customer makes the best decisions for their home. We take the time to explain the "why" behind every recommendation, empowering homeowners rather than pressuring them.

Unwavering Integrity

We fix the root cause, not just the symptom. If a system can be repaired reliably, we repair it. If it needs replacement, we provide clear Good-Better-Best options without the hard sell.

The Neighborly Done Right Promise

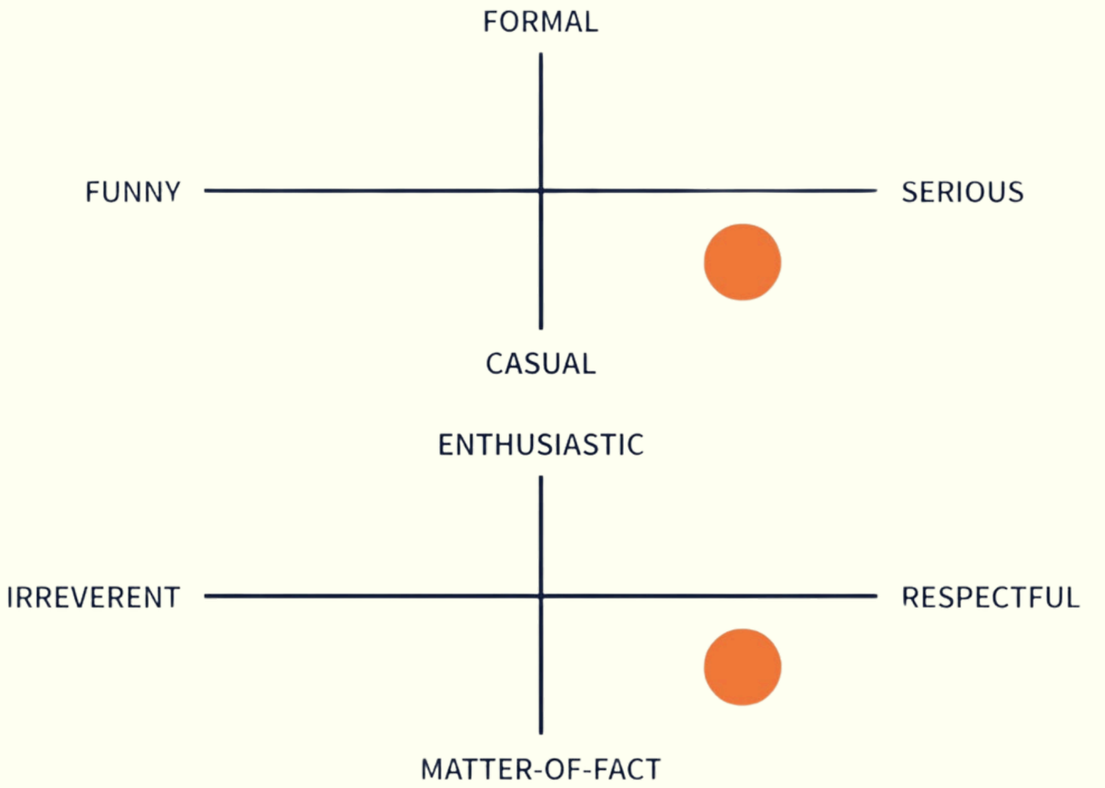
We stand behind our work with absolute certainty. If a job isn't done right, we promise to make it right. Our reputation in the community is our most valuable asset.

Respect for Your Home & Time

From 30-minute advance arrival texts to wearing booties and leaving the workspace cleaner than we found it, we treat every customer's property with the utmost respect.

Brand Voice

How AireServ Communicates with Hendricks County



Key Messaging Strategy

How We Communicate with Hendricks County

Leadstra

Our messaging must consistently reinforce our positioning as the trusted, education-first HVAC expert. These five core pillars define the tone, focus, and content of all AireServ communications.

1. Education First, Sales Second

We don't just tell customers what's broken; we show them and explain why it matters. By focusing on education and presenting clear Good-Better-Best options, we empower homeowners to make their own decisions without feeling pressured.

2. The Neighborly Done Right Promise

We lean heavily into our guarantee. In an industry plagued by fly-by-night operators and shoddy workmanship, our promise to "make it right" provides the ultimate peace of mind for skeptical homeowners.

3. Transparent, No-Surprise Pricing

We communicate our pricing structure clearly and upfront. By explaining our dispatch fee and flat-rate pricing model before we arrive, we eliminate the fear of hidden costs and bait-and-switch tactics.

4. Respect for Your Home & Time

We highlight our professionalism at every touchpoint. From 30-minute advance arrival texts to wearing booties and leaving the workspace spotless, we show that we value the customer's property and schedule.

5. Proactive, Not Reactive

We shift the conversation from emergency repairs to long-term health and efficiency. Through seasonal tune-up reminders and indoor air quality education, we position ourselves as partners in maintaining the home's comfort.

Proposed Marketing Initiatives

Strategic Action Plan to Drive Growth

Leadstra

Based on the market analysis and identified opportunities, we have developed four prioritized marketing initiatives. These are designed to address immediate operational bottlenecks, build a proactive reputation, and generate high-quality leads.

01 CSR Optimization

Fixing the front-door bottleneck by optimizing the Customer Service Representative (CSR) script. This ensures the dispatch fee is explained clearly as a value-add (thorough diagnostic) rather than a barrier, setting the right expectations before the technician arrives.

02 Systematic Review & Referral Engine

Formalizing the "cheerleader" strategy to turn satisfied customers into active lead sources. This includes automated review requests, a structured referral program, and leveraging community platforms like Nextdoor and local Facebook groups.

03 Education-First Content Strategy

Building proactive brand awareness through educational social media content. By answering common HVAC questions and explaining system maintenance before emergencies strike, AireServ establishes itself as the trusted local expert.

04 Hyper-Local Digital Amplification

Multiplying the impact of the traditional "Box 9" door hanger strategy by deploying geo-targeted digital advertising around active job sites. This creates an omnichannel presence in specific neighborhoods, increasing brand recall and trust.

Initiative 1: CSR Optimization

Fixing the Front-Door Bottleneck

Leadstra

THE BOTTLENECK

Currently, the dispatch fee is acting as a barrier rather than a filter. When the CSR simply states the fee without context, price-sensitive callers and even ideal clients (who have been burned by hidden fees before) balk and hang up.

This means Our Company is losing valuable "at-bats" before the technician ever gets a chance to arrive at the home, demonstrate value, educate the customer, or build trust.

THE OPTIMIZATION

We must reframe the dispatch fee from a "cost to show up" to a "comprehensive diagnostic service." The CSR script needs to immediately communicate the value of what the customer is getting for that fee, shifting the focus from price to expertise.

`NEW SCRIPT FRAMEWORK`

INSTEAD OF: "It's $99 for us to come out and take a look."

SAY THIS: "Our comprehensive diagnostic is $99. For that, our certified technician will come to your home, perform a complete system evaluation, identify the exact root cause of the issue, and provide you with clear, upfront options for repair before any work begins. When would you like us to schedule that?"

Initiative 2: Systematic Review & Referral Engine

Formalizing the "Cheerleader" Strategy

Word-of-mouth is currently Our Company’s strongest asset, but it relies on organic, unprompted action. This initiative formalizes the process to turn satisfied customers into an active, predictable lead generation engine.

01

Automated Review Capture

Strike while the iron is hot by capturing the customer's delight immediately after the service is completed.

- Trigger automated SMS and email review requests within 1 hour of job completion
- Direct happy customers specifically to Google Reviews and Nextdoor

02

An Effective Referral Program

Create a frictionless, high-value incentive structure that rewards both the referrer and the new customer.

- Implement a "Give $50, Get $50" dual-sided incentive program
- Equip technicians with premium, physical referral cards to leave behind after successful calls

03

Community Amplification

Identify "super fans" and leverage their influence within hyper-local digital communities.

- Monitor local Facebook groups (e.g., Avon Moms) for HVAC recommendation requests
- Encourage identified brand advocates to share their positive experiences in these specific forums

Initiative 3: Education-First Content Strategy

Leadstra

Building Proactive Brand Awareness Before Emergencies Strike

The Objective

Shift the conversation from reactive emergency repairs to proactive home health and efficiency. By consistently publishing high-value, educational content, Our Company establishes itself as the trusted local expert, reducing friction and skepticism when a service call is eventually needed.

Distribution Channels

- **Facebook & Instagram:** Short-form video tips, behind-the-scenes technician spotlights, and customer testimonials.
- **Nextdoor:** Community-focused advice, seasonal reminders, and local event participation.
- **Google Business Profile:** Weekly updates with FAQs, photos of completed jobs, and detailed service explanations.
- **Email Newsletter:** Monthly "Home Health" updates sent to the existing customer database.

Core Content Pillars

- **The "Repair vs. Replace" Guide:** Transparent frameworks helping homeowners understand when it makes financial sense to fix an old system versus investing in a new one.
- **Indoor Air Quality (IAQ):** Educating families (especially ICP 1) on how proper filtration and humidity control impact health and comfort.
- **Demystifying the Dispatch Fee:** Explaining exactly what happens during a diagnostic visit to reframe the fee as a valuable service rather than a hidden cost.
- **Seasonal Checklists:** Actionable, DIY-friendly tips for preparing homes for extreme Indiana summers and winters.
- **"Meet the Team" Spotlights:** Humanizing the brand by showcasing the background-checked, highly trained technicians who will be entering customers' homes.

Initiative 4: Hyper-Local Digital Amplification

Multiplying the Impact of the "Box 9" Strategy

The traditional "Box 9" strategy involves placing door hangers on the nine houses surrounding a current job site. By amplifying this physical touchpoint with hyper-local digital advertising, we create an inescapable neighborhood presence.

The Concept

Take the physical "Box 9" door hanger strategy and mirror it digitally. When a technician is dispatched to a neighborhood, we activate a tight geo-fenced digital ad campaign targeting that specific subdivision or zip code for 48-72 hours.

The Execution

Utilize Facebook, Instagram, and Google Display Network ads with a 1-mile radius around the active job site. The ads run concurrently with the physical presence of the branded van and the distribution of door hangers.

The Message

The ad copy is highly contextual and neighborly: *"We're in your neighborhood today helping your neighbors stay comfortable. Need us to stop by for a quick tune-up or assessment while we're close?"*

The Impact

Creates the illusion of massive local market dominance. When a homeowner sees the van, finds a door hanger, and sees a digital ad on their phone all in the same week, it builds immediate trust and dramatically increases conversion rates.

Implementation Roadmap

90-Day Strategic Rollout Plan

Leadstra



Next Steps

Moving from Strategy to Execution

Leadstra

IMMEDIATE ACTIONS (NEXT 30 DAYS)

01 **Finalize CSR Script:** Implement the optimized dispatch fee script and train the front-line team to reframe the fee as a comprehensive diagnostic service.

02 **Automate Review Requests:** Set up the SMS and email sequence to trigger immediately after job completion, directing happy customers to Google and Nextdoor.

03 **Launch Referral Program:** Design and print the "Give $50, Get $50" referral cards for technicians to leave behind on successful service calls.

04 **Deploy Digital Amplification:** Launch the first hyper-local digital ad campaign around an active job site to multiply the impact of the "Box 9" strategy.

THE 90-DAY GOAL

Generate more **"at-bats"** by removing the dispatch fee bottleneck at the front door.

Build a **proactive neighborhood reputation** that drives high-quality, high-trust leads before emergencies strike.

Establish Our Company as the undisputed **trusted HVAC expert** in Avon, Plainfield, and Brownsburg.

Thank You

"Our goal isn't just to fix HVAC systems. It's to build a legacy of trust in Hendricks County by doing the right thing, every single time."

OWNER

Our Company

