

Mesa Comfort Heating & Air — Business Plan

HVAC business in San Antonio, TX · Startup plan

Executive summary

Mesa Comfort Heating & Air is a new HVAC business in San Antonio, TX offering AC and furnace repair and diagnostics; system replacements and new installs; seasonal maintenance plans; and ductless mini-splits, heat pumps and indoor air quality. The model is honest repair work priced flat-rate, installs quoted as packages, and a maintenance-plan base that carries the seasonal dips.

Startup budget: \$32,750 across 10 items, funded from savings. Target: \$30,000 in monthly sales.

Twelve months from now, success looks like this: Two hundred maintenance-plan members, a second technician, and installs as half of revenue

Products and services

Mesa Comfort Heating & Air's core service is AC and furnace repair and diagnostics. Service calls have a clear fee and flat-rate pricing, installs are quoted as a package with financing options, and every visit is a chance to sell the maintenance plan that brings the customer back each season.

- AC and furnace repair and diagnostics
 - System replacements and new installs
 - Seasonal maintenance plans
 - Ductless mini-splits, heat pumps and indoor air quality
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Market analysis

The customers are homeowners whose system failed at the worst moment, the maintenance-plan members who never want that to happen, landlords with units to keep running, and the homeowners replacing an aging system after a few quotes.

- Homeowners with a system that stopped working — often in a heat wave or cold snap
- Maintenance-plan members who want a tune-up every season
- Landlords and property managers with units to keep running
- Homeowners replacing an aging system, usually after two or three quotes

Marketing strategy

Most customers will find Mesa Comfort Heating & Air on Google Maps and through word of mouth — the technician who fixed it right and didn't upsell. Reviews on the Google Business Profile, a wrapped van, and a website with services, financing and online booking turn an emergency search into a call; maintenance plans keep the customer.

- Google Business Profile and Google Maps — “AC repair near me” and “HVAC” plus your city
- Word of mouth and referrals — an honest technician gets recommended
- Maintenance plans that bring the same customers back every season
- Property managers, realtors and builders who need a reliable contractor
- A website with services, financing options, reviews and online booking

Operations plan

The owner runs the calls in year one from a stocked van, tracks callbacks and first-visit fixes, keeps refrigerant logs clean, sells the maintenance plan at every job, and hires a technician when the plan base and the install pipeline cover the wage.

- A service-call fee, flat-rate repair pricing and installs quoted as a package
- Maintenance plans sold on every service call — they smooth the seasonal dips
- The van stocked from a parts list so most repairs finish in one visit
- Refrigerant handled, logged and recovered to EPA rules
- Reviews requested at every job, and every installed system followed up

Startup costs

What it will take to open the doors, funded from savings.

Startup costs

ITEM	AMOUNT
State HVAC contractor license, exams and EPA 608 certification	\$900
Tools, gauges, recovery machine and vacuum pump	\$5,000
Service van (used) and shelving	\$12,500
General liability insurance and bond (first year)	\$3,250
Business registration, LLC and local permits	\$350
Opening parts and refrigerant inventory	\$2,500
Van wrap or lettering, uniforms and business cards	\$1,750
Website with online booking and Google Business Profile	\$0
Dispatch, invoicing and payments software (first year)	\$0
Working capital (first two months)	\$6,500
Total	\$32,750

Typical range to start an HVAC business in the US: \$13,400–\$56,100. Your list is what you decided to spend — replace estimates with real quotes as you get them. Website with online booking and Google Business Profile: Your Zarla plan includes the website with online booking and walks you through your Google Business Profile — a designer typically charges \$2,000 or more to build one. Dispatch, invoicing and payments software (first year): Your Zarla plan includes online booking, invoicing and customer management with your website — a dedicated dispatch tool can wait until you have a second technician.

Financial plan

The numbers below come from your own startup list and typical monthly costs for a small HVAC business in the US. Parts and equipment for jobs are the big monthly line and are paid before the customer pays; the seasonal swing is what the reserve is for.

Typical monthly operating costs for an HVAC business: \$4,100–\$28,200 a month, before the owner's own pay.

At \$30,000 in monthly sales, Mesa Comfort Heating & Air would clear \$1,800–\$25,900 a month before owner pay and tax, and recover the \$32,750 startup budget in roughly 2–19 months.

Typical monthly operating costs

COST	TYPICAL RANGE
Parts, refrigerant and equipment for jobs	\$3,000–\$15,000
Fuel, van payment and maintenance	\$500–\$1,500
Insurance and bond	\$150–\$450
Dispatch, invoicing and payments software (included with Zarla)	\$0–\$250
Marketing and lead services	\$300–\$2,500
Phone, bookkeeping and license renewals	\$150–\$500
Technician wages (once you hire)	\$0–\$8,000

US ranges for a small operation; replace with your own figures as you learn them. Lines marked (included with Zarla) are what those tools cost separately — with Zarla they are part of one monthly plan.

Risks and honest downsides

Every HVAC business plan should say out loud what can go wrong. For Mesa Comfort Heating & Air, the real risks are:

- Demand is brutally seasonal — a mild summer or winter hurts, and the shoulder months are quiet
- Installs are cash-heavy: equipment is paid to the supplier before the customer pays you
- Callbacks and warranty work eat margin unless the diagnosis and install are right first time
- Refrigerant rules and licensing are enforced; shortcuts risk the license
- A van and tools are one theft or breakdown away from a lost week

Licenses, permits and insurance

What Mesa Comfort Heating & Air needs before it can legally trade in the US. Rules vary by state and city — confirm each item with your local licensing office and an accountant.

- State HVAC contractor license — Most US states license HVAC contractors — exams, experience and often a bond; some license at the city or county level instead.
 - EPA Section 608 certification — Federally required in the US for anyone handling refrigerants.
 - Business registration and EIN — Most owners form an LLC; register a DBA if you trade under another name.
 - General liability insurance and bond — Required by most licenses and by every property manager and builder you'll work for.
 - Permits per install — System replacements usually require a mechanical permit and inspection from the city or county.
 - Workers' compensation — Required in most states once you have employees.
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Milestones: the next 30 days

The first month's to-do list for Mesa Comfort Heating & Air, in order:

- Confirm the license, bond and EPA 608 certification your state requires and start the applications
 - Register the business, get an EIN and open a business bank account
 - Get insurance quotes and open accounts with two equipment suppliers
 - Set your service-call fee, flat-rate repair book and install packages from real costs
 - Stock the van from a parts list so first-visit fixes are the norm
 - Set up a free Google Business Profile and put a website with online booking live
 - Call every realtor, property manager and builder you know
 - Sell a maintenance plan on every service call and ask for a Google review at the door
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Appendix: what a lender will ask for

This plan tells the story and shows the numbers. If you take it to a bank, expect to be asked for these documents as well:

- Two years of personal tax returns and a personal financial statement
- A month-by-month 12-month cash-flow projection that shows the seasonal swing
- Proof of license, bond, EPA certification and insurance
- Maintenance-plan members and any contracts with property managers or builders
- Quotes for the van, tools or equipment if you're borrowing for them
- Your credit report and the van and tools as collateral

Sample plan for a fictional business, written by Zarla's free business plan generator. Every figure is a typical US range or calculated from the sample's own numbers — nothing is a market projection. Make it yours in five questions:
zarla.com/business-plan-generator?industry=hvac

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