

FREE DIAGNOSTIC TOOL

HVAC MARKETING REVENUE FORECARD

Score your marketing in 5 minutes.
Find where revenue is leaking.
Know exactly what to fix first.

AFTER YOU SCORE YOURSELF:

If your score reveals gaps, get a professional Revenue Control Assessment from Lyriden Studio — a structured \$495 diagnostic built for HVAC operators doing \$750K–\$5M who are ready to control their growth.

lyridenstudio.com/home-service-marketing-audit-for-hvac-roofing-plumbing-companies

How to Use This Scorecard

This scorecard follows Lyriden Studio's **5-Part Revenue Control System™** — the same framework used in our paid Marketing Diagnostic. Work through each section honestly. Check every statement that is *consistently true* in your business right now.

Step	Action
1	Read each statement carefully
2	Check the box only if it's consistently true — not occasionally
3	Tally your points at the end of each section
4	Add all sections for your Total Revenue Control Score
5	Read your score interpretation on the final page

What This Is Not

This is not a trick quiz or a sales funnel disguised as a tool. Every question reflects a real business variable that impacts your cost-per-job, close rate, and revenue predictability. If you answer honestly, your score will tell you something true about your business.

Section	Part	Your Score	Max
Part 1	Target Clarity	_____	20
Part 2	Lead Flow Visibility	_____	20
Part 3	Cost-Per-Job Control	_____	20
Part 4	Sales Accountability	_____	20
Part 5	Scale Readiness	_____	20
TOTAL REVENUE CONTROL SCORE		_____	100

1

TARGET CLARITY

Do you know what you're actually aiming at?

Marketing without a revenue target is just spending money. This section measures whether your business operates from defined goals or reacts to whatever comes in.

- I have a specific annual revenue target written down 4 pts
- I know exactly how many jobs per month I need to hit that target 4 pts
- I know my average ticket value per job type (HVAC install, tune-up, repair) 4 pts
- My marketing spend is calculated from my revenue target — not guessed 4 pts
- I review revenue performance at least monthly against my target 4 pts

PART 1 SCORE: _____ / 20

DIAGNOSTIC INSIGHT: If you can't state your revenue target in under 10 seconds, your marketing has no anchor. Every dollar you spend is untethered.

2

LEAD FLOW VISIBILITY

Can you see where your leads actually come from?

Most HVAC owners know they're getting calls. Very few know which channel produced which call — or what those calls cost. Without this, you can't cut waste or double down on what's working.

- I can tell you exactly how many leads came in last month 4 pts
- I know which channels (Google, LSA, referral, etc.) generated each lead 4 pts
- Every inbound call is answered live or returned within 5 minutes during business hours 4 pts
- I have a consistent process for logging and following up on missed calls 4 pts
- I can pull a lead report at any time without digging through spreadsheets 4 pts

PART 2 SCORE: _____ / 20

DIAGNOSTIC INSIGHT: If leads go to voicemail and don't get a same-day callback, you're paying for leads you're throwing away. This is a revenue control failure, not a marketing problem.

3

COST-PER-JOB CONTROL

Do you know what it costs to book a job?

Your cost per booked job is the most important number in your marketing. If you don't know it, you're flying blind. If it's too high, your margin is already gone before the truck leaves the shop.

- I know my current cost per lead (total ad spend ÷ leads) 4 pts
- I know my close rate (leads that become booked jobs) 4 pts
- I know my cost per booked job (cost per lead ÷ close rate) 4 pts
- My cost per booked job is within a profitable range for my service types 4 pts
- I review cost-per-job at least monthly and adjust ad spend accordingly 4 pts

PART 3 SCORE: _____ / 20

DIAGNOSTIC INSIGHT: A \$45 cost per lead sounds great until your close rate is 20%. That's \$225 per booked job. If your average ticket is \$180, you're losing money on every job you market.

4

SALES ACCOUNTABILITY

Is your team converting the leads you're paying for?

Marketing generates opportunity. Sales converts it. Many HVAC companies blame marketing when leads don't convert — but the problem is often in how calls are handled, estimates are presented, or follow-up is executed.

- I know my team's current close rate on inbound leads 4 pts
- CSRs and technicians follow a consistent call script or intake process 4 pts
- We have a formal follow-up process for estimates that weren't booked same-day 4 pts
- I review call recordings or booking rates at least twice a month 4 pts
- There is one person clearly accountable for booking rate performance 4 pts

PART 4 SCORE: _____ / 20

DIAGNOSTIC INSIGHT: A 10% improvement in close rate has the same financial impact as a 10% increase in leads — at zero additional ad spend. Most HVAC owners chase more leads instead of fixing the conversion.

5

SCALE READINESS

Is your business built to grow — or just to survive?

Growth without infrastructure creates chaos. This section reveals whether your systems can support more volume — or whether scaling right now would break what you've already built.

- My current marketing channels are tracked well enough to increase investment confidently 4 pts
- My operations can handle 20% more call volume without quality suffering 4 pts
- I have a defined customer follow-up process for reviews and repeat business 4 pts
- I know which service type or zip code produces my highest-margin jobs 4 pts
- I have a 90-day marketing plan with specific growth targets — not just 'run more ads' 4 pts

PART 5 SCORE: _____ / 20

DIAGNOSTIC INSIGHT: The goal is not more leads. The goal is controlled, profitable growth. You scale what works — but only after you can see what works.

Your Revenue Control Score

Add up your section scores. Find your total below.

TOTAL REVENUE CONTROL SCORE: _____ / 100

What Your Score Means

● 90–100	Revenue Ready	Your marketing math works. Focus on scaling what's working.
● 70–89	Leaking Revenue	You have the basics but gaps are costing you jobs.
● 50–69	Inconsistent System	Marketing is running but uncontrolled. Results will plateau.
● Below 50	Broken Foundation	You're spending without control. Stop and reset the math.

What To Do With Your Score

This scorecard shows you *where* you're leaking revenue. It doesn't tell you *exactly how* to fix it — because that depends on your specific numbers, your market, and your current setup.

If your score reveals gaps — especially in Lead Flow Visibility, Cost-Per-Job Control, or Sales Accountability — those gaps are actively costing you money right now. The question is how much.

GET YOUR NUMBERS PROFESSIONALLY REVIEWED

The Lyriden Studio Home Service Marketing Diagnostic is a structured \$495 Revenue Control Assessment built for HVAC companies doing \$750K–\$5M who want to stop guessing and start controlling growth.

✓ True cost-per-job calculation ✓ Channel performance breakdown ✓ Sales process visibility ✓ Priority 90-day roadmap

lyridenstudio.com/home-service-marketing-audit-for-hvac-roofing-plumbing-companies

We personally review each diagnostic application before sending a payment link. If it's not a fit, we'll tell you.