

HVAC Maintenance Agreement Template

Fill in one section at a time. This is the plan that does not leak: anchored to the equipment, scoped to a standard, and renewed on service.

The agreement template

01 Plan name and tier

Name the plan and the tier. A clean three-tier shape works: Basic (scheduled tune-ups), Premium (priority service and a repair discount), Comprehensive (quarterly visits and parts coverage). Call it an agreement or a membership, never a contract.

02 Equipment covered

Anchor the plan to what the customer bought or the systems you service. Tie coverage to the unit, not to an open-ended promise.

03 What is included

List the scheduled visits per year, the priority-service promise, the repair discount percentage, and any parts coverage. Build the visit checklist on ANSI/ASHRAE/ACCA Standard 180 rather than inventing one.

04 What is excluded

Name the exclusions and put a clear boundary on emergency labor. This is the line that keeps a busy plan profitable instead of turning it into a money pit.

05 Price and margin

Set the annual or monthly price. Price at your true service-delivery cost plus 30 to 50 percent, run each in-plan visit at 60 to 80 percent of your normal rate, and build a 5 to 15 percent maintenance buffer into every install that feeds the plan.

06 Term, renewal, and escalation

State the term, keep a card on file, and make opt-out a single step. Build a small annual increase in from day one, disclosed up front, so renewal is never a fight. Win on service, not handcuffs.

07 The offer (point-of-sale script)

Write the one-paragraph offer the tech says at job completion and at install, while trust is highest. Name the included window (the first few months at no extra charge) and the simple ask to set it up before leaving.

Close the five leaks

A plan leaks at five points. Check the one that is costing you the most, then close it first.

- The offer**
A scripted offer at job completion, when trust is highest.
- The visit**
Auto-book the next tune-up before the tech leaves.
- Priority**
A real member lane: first calls and a written response window.
- The billing**
Card on file with automatic retry on a failed charge.
- The renewal**
Easy opt-out renewal, so leaving is never the default.

The attach-rate worksheet

Four steps. Where you land tells you the one move to make next.

1. Calculate your attach rate

_____ members ÷ _____ active customers = _____ % attach

2. Place your shop on the Recurring-Revenue Maturity Curve, and 3. make the one move

Stage	Attach rate	The one move to the next stage
Starting	0 to 15%	Make the offer at every visit, not just on request.
Building	15 to 30%	Auto-schedule the visits and add a real member lane.
Compounding	30 to 50%	Attach at install via the warranty bridge; card on file.
Asset	50%+ of revenue	Hold renewal at 60 to 70 percent. The book drives the sale.

4. Set your target for the quarter

By the end of this quarter my attach rate will be _____ %.

The one leak I will close first is _____