

HVAC SOP Template

One format, six fields, one page. Copy this block once per procedure and keep each SOP to a single page.

SOP # _____

OWNER _____

DATE _____

Trigger

The exact event that starts this procedure. Name the moment it begins, for example a service call coming in or a quote being approved.

Owner

The single role responsible for the outcome. One job title, not a committee, even in a two-person shop where that title is you.

Inputs

What the owner needs on hand before they start: customer address, equipment model, the price book, the signed approval.

Steps

The three to seven actions that get it done, numbered, in order. If you need more than seven, you are describing two procedures.

Edge Cases

The two or three exceptions that actually come up, such as the customer not being home or a part on backorder. Name them so nobody improvises.

Escalation

Who gets called when the steps do not cover it, and when. This is the release valve that keeps a stuck tech from guessing on your reputation.

The eight SOPs to build, in order

Write two at each stage, not eight on day one. Check each one off as its one-page template is finished and in use.

Stage 1 1 truck — you are the operator

- Dispatch and scheduling
- Install and job delivery

Stage 2 2 trucks — the money side leaves your head

- Paid pre-estimate site visit
- Quote and approval

Stage 3

3 trucks — turn finished jobs into a book of business

- Maintenance visit
- Customer follow-up and callback

Stage 4+ 4 or more trucks — protect margin at scale

- Hire and onboard
- Material sourcing and inventory

The Software Readiness Scorecard

Before you spend a dollar on software, score your shop. Count the slippage signals, find your truck-count row, and read your verdict. If you are not ready, the eight SOPs above are what to fix first.

STEP 1 · COUNT YOUR SLIPPAGE SIGNALS

Check each one that happens most weeks, not just once in a bad month.

- Leads slip.** Calls and web inquiries go unreturned, or you cannot say how many leads came in last week.
- Estimates stall.** Quotes sit for days, or you lose track of which ones are still out and which were approved.
- Invoices lag.** Jobs finish but go uninvoiced for days, or you cannot see at a glance who still owes you.
- Dispatch breaks.** Double-bookings, a tech sent to the wrong address, or a schedule three people edit at once.

YOUR SCORE _____ of 4 signals

STEP 2 · FIND YOUR VERDICT

Your stage sets the floor. Your score sets the timing.

STAGE	BUY NOW WHEN	UNTIL THEN
1 truck	Not yet, at any score	Write the SOPs above. Software would only scale the gaps.
2-3 trucks	3 or more signals	Optimize the process and tighten the handoffs first.
4-8 trucks	2 or more signals	Optimize, and start shortlisting a stage-matched tool.
8+ trucks	1 or more signals	You are likely past due. Buy and onboard deliberately.

Read it like this. Find your truck-count row, then compare your score to the buy-now column. **Buy now** means buy a stage-matched tool. **Optimize** means write the SOPs above and tighten the cash cycle first. Software multiplies a working process. It cannot create one.