



HVAC Discovery Guide

For Reseller Channel Partners | Field Service Management

Purpose

To help you guide a real conversation with an HVAC business owner or GM, not a pitch. The goal is to help them describe, in their own words, what disorganization costs their business: time, money, staff sanity, and, equally importantly, their customer experience. People switch because they hear themselves say the problem out loud.

How To Use This Guide

Each section addresses a pain point we frequently see in HVAC businesses. For each section, you will find three parts: **The Setup** describes what these pain points look like day-to-day in their HVAC shop. **Discovery Questions** are open-ended questions you can choose to ask the owner. And **Why This Matters** is a short, honest bridge to how Results can help.

1. The Paper and Duplicate Entry Trap

The Setup

In a lot of HVAC shops, techs write job notes by hand out in the field, on a clipboard or a paperwork order. Those notes must then physically make it back to the office before anyone can type them into QuickBooks or whatever system runs the back office. During busy season, that backlog can pile up fast.

Discovery Questions

- Walk me through what happens after a tech finishes a job, from the moment they leave the customer site, to when that information actually shows up in your system.
- How many times does the same piece of information, a customer name, a part used, or a diagnosis, get written or typed by more than one person?
- Who is responsible for re-entering handwritten notes, and how much of their week does that take up?
- Has a job ever stalled, or did a customer have to wait longer than they should have because paperwork sat in a pile somewhere?
- If I asked your techs and your office staff the same question about how this process works, would I get the same answer from both?

Why This Matters

Results provides instant visibility by having techs enter notes, take "Before," "During," and "After" pictures, add product usage, document additional services delivered, collect signatures, and complete job details ONCE. All of this is done in the field, using the Results Mobile app on a phone or tablet. The office and other supporting team members see it immediately. No retyping, no handwriting to decode, no pile of relevant client job information sitting on someone's desk.

2. The "Waiting On ____" Bottleneck

The Setup

Some shops run on a physical tracking system and may use a folder or checklist that has to travel with the job before the next step can happen. That works at a small scale. But as the business grows, that folder turns into an actual bottleneck. Nothing moves until the folder or checklist is in hand, and if it gets set down in the wrong place, the customer's project does too.

Discovery Questions

- If a job is sitting at step three of six right now, could you tell me that without walking over to a desk or calling someone?
- Has a project ever stalled because a physical file or checklist was not where it needed to be, or because it was missing critical information because it had not been filed?
- When a customer calls asking where their project stands, how long does it take your team to give them a confident answer?
- If your best office person or technician called in sick tomorrow, could someone else pick up exactly where they left off on every active job?

Once we reached a certain threshold, handling an office filled with paper files became overwhelming. Results enabled us to transition into a paperless company, allowing us to refine our processes. The fear of misplacing or losing files is now a thing of the past, as everyone within the company can easily access the real-time status of any project or service order. ~ Philip Sanders, A-1 Guaranteed Heating and Cooling

Why This Matters

Results replaces the physical folder with a real-time digital record of where every project stands. Everyone on the team can see it, all the time, without hunting down a piece of paper. In addition, its powerful project management features let jobs move seamlessly from one stage to another as technicians complete tasks.

3. Handling Rebates, Permits, And Regulatory Complexity

The Setup

HVAC continues to grow more complicated. Rebate programs, permit requirements, and clean energy incentives keep shifting, and each one adds steps most shops did not have to think about five years ago. A business that handles rebates well can turn that into a real advantage, but only if it can track and manage the added complexity without it becoming a liability.

Discovery Questions

- When a rebate or incentive program changes, how does that update reach everyone on your team who needs to know?
- How do you currently keep track of which customers are mid-process on a rebate, and what is still outstanding on each one?
- Has a rebate or permit step ever gotten missed or delayed? What did that end up costing in time, money, or trust?
- Do you feel like you are able to compete on rebates and incentives right now, or does the complexity make you want to avoid offering them?
- If a new program or regulation came out next month, how much work would it take to get your whole team operating under the new rules?

Why This Matters

Results' Processes feature lets you build a rebate or permit workflow once, then reuse and adjust it as programs change. Your team can adapt to new regulations without starting from scratch, and nothing falls through the cracks on multi-step jobs.

4. Growth That Outpaces Your Systems

The Setup

Often, growth does not just add more of the same work; it multiplies the complexity. More jobs, more people, more moving parts mean the inefficiencies that were just annoying at a small scale get genuinely painful at a bigger one. Many businesses do not truly feel it until they have already crossed that line.

Discovery Questions

- Compared to a few years ago, does it feel like your operations have gotten harder to manage as your revenue or job count has grown?
- What is one thing that used to be easy to manage that has become a real headache as you have taken on more work or more people?
- If you doubled your job volume next year without changing anything else about how you operate, what would break first?

- Is there a ceiling on how big you could grow with your current way of doing things? Do you know where it is?

Why This Matters

Results is built to scale with a business. The same system that runs a shop's daily scheduling and field service management can also manage large, custom, multi-step projects across a much bigger team without the process falling apart. In fact, the larger and more complex a company grows, the more benefit it will deliver because of Results' flexibility and configurability.

5. Team Accountability and The Owner's Peace of Mind

The Setup

Without a shared, visible system, accountability tends to come down to memory and trust. The owner or manager must ask around to find out what has been done and what has not. That can create a low-grade adversarial dynamic, i.e., "did you turn in your paperwork?" instead of a constructive one. It also means the owner is carrying a lot of information in their head that a system could be tracking instead.

Discovery Questions

- Right now, if you wanted to know the status of every active job in your business, how would you find that out, and how long would it take?
- If you took 2 weeks off, how confident are you that things would keep moving the way you would want them to?
- When something falls behind, is it usually clear why, or do you have to go ask someone?
- How would you describe the day-to-day conversations between you and your team about unfinished work? Do they feel collaborative, or more like you are chasing people down?
- How much of your day goes toward figuring out what is going on, versus actually running or growing the business?
- How do you currently handle a customer dispute or issue like "your team left a huge mess?" Or "they broke something while they were here?" Do you have before, during, and after pictures with time stamps to document everything? If so, where do those live?
- Do your technicians have easy access to all the documents and job specifications they need for each job? (Examples include HVAC models, permits, floor plans, the User Manual for the specific HVAC model installed at that location, and any accessories installed, like humidifiers.) What happens when they do not have this information at hand?
- Do your technicians have to start their day at the office to pick up their paperwork, then end it at the office to drop it off? How much lost time are they spending in traffic?

- Are you confident that your staff is capturing all relevant time and costs on each job?

Why This Matters

Results creates visibility across all jobs and projects with a shared, real-time view of every job and every task, with notes and relevant documents attached. Technicians can easily add parts, additional work required, and all relevant photos for each job, while in the field using the Results Mobile app and their phone or tablet. The conversation shifts from what is going on to something a lot more specific and constructive, because the information is already visible to everyone.

6. Customer Experience and Competitive Edge

The Setup

Everything above eventually shows up on the customer's side too. How fast they get updates, how confidently your team can answer their questions, and whether your business can offer things like navigating rebates, that a disorganized competitor cannot pull off reliably.

Discovery Questions

- When a customer asks about the status of their project, rebate, or permit, how confident is your team giving them an answer on the spot?
- Have you ever had to apologize to a customer for a delay that was really caused by something happening, or not happening, internally? Do you feel like you are able to offer customers the full range of options, rebates, financing, service tiers, or does the complexity of tracking it all hold you back?
- What would it mean for your business if customer service, communication, and follow-through became one of your clearest competitive advantages?

Why This Matters

When a team has real-time visibility into every job, they can give customers accurate, confident answers. What is often a source of friction, delays, uncertainty, and missed rebates can instead become a point of differentiation. Real-time photos of the “before, during, and after” stages of each job help ensure your staff is never unfairly accused by a customer.

7. Good Fit Signals

Not every HVAC business is ready for a conversation about Results today, and that is fine. These signals are a gut check to help you read the room before or during discovery, not a scorecard to fill out.

Strong Signals A Prospect Is A Good Fit

- The business is currently running on a mix of tools, some combination of paper, spreadsheets, QuickBooks, and maybe a basic scheduling app, rather than one integrated system.
- They handle installs or projects with multiple steps, not just single-visit repairs. Anything involving permits, rebates, or multi-day installs is a strong indicator.
- They have more than a handful of employees, techs plus office staff, so information actually has to travel between people rather than living in one person's head.
- The owner or GM brings up growth, more jobs, more people, more locations, as something that is straining their current setup.
- The owner describes spending real time each day just figuring out job status, rather than running or growing the business.
- Institutional knowledge seems to live in one or two people's heads rather than in a system.
- Significant friction exists in business operations.

Signs There May Be Significant Friction In The Daily Operations

- Inaccurate or incomplete billing. The business is leaving money on the table by not billing for actual time, or for parts used, or for additional services requested or needed while at the job site
- Staff have to come to the office first to pick up their “paperwork”, then have to come to the office at the end of their day to deliver the “paperwork”; all wasting time sitting in traffic in both directions and reducing billable time and productivity.
- Techs cannot generate an invoice on the spot and receive payments or a deposit to start a project without calling the office and having them handle it via email.
- Time tracking is “iffy”, often relying on the technician’s word.
- Special instructions for per site/location for code to enter or lockbox to access or client instructions of “do not knock on upper-level door but talk to resident at the lower level”...often get lost, and the technician does not have the right information when they arrive at the job site.
- Techs do not have easy access to Project-Level documents like permits, floor plans, or the user manual for the specific HVAC model installed at that location, plus any accessories installed, like humidifiers.
- Recurring job visits, like twice-a-year maintenance visits to configure the HVAC for winter and summer and check the main unit for any needed maintenance or repairs, are difficult to track.
- Rebates or government incentive programs for customers come up in conversation. Either they are already offering them, and it is a headache, or

they know they should be offering them and are not because it feels like too much to manage

- Client Services staff cannot easily answer questions about exactly what was done onsite and defend their staff with immediate documented proof of what the site looked like before, during, and after techs were done, with pictures.

Signals It May Be Too Early

- A very small operation, one or two techs, doing simple, single-visit jobs with little project tracking/complexity. The pain this guide surfaces may not exist yet for them.
- A business that already has a well-functioning integrated system they are happy with and is not experiencing the pain points above.
- An owner who is not open to changing internal processes at all. Because Results is highly configurable, it works best for businesses willing to document and create workflows, not just swap one off-the-shelf piece of software for another.

8. Closing The Conversation: What Life After Results Can Sound Like

Once an owner has talked through a few of these pain points, it helps to paint a picture of what changes. Based on how existing HVAC customers describe it, here are a few shifts worth mentioning.

- The did you turn in your paperwork conversation turns into finish your notes. Same accountability but a lot less friction, because the information is already visible and the conversation gets specific instead of personal.
- Opening the system in the morning tells the whole story. What is in play, what is next, who owns it, without walking around the office to piece it together.
- Anyone can answer a client question when they call.
- Adapting to change stops being a scramble. When a rebate program or regulation shifts, the business can update its process once and roll it out to the whole team instead of reworking everything from scratch.
- Owners stop being the single point of failure for institutional knowledge. Onboarding, project tracking, and day-to-day handoffs run through the system instead of living in one person's head.
- Every technician has everything they need to arrive prepared, understand what is needed, and quickly complete the work to delight the customer.
- Profitability goes up because all relevant costs (labor, parts, extra requests from clients, etc.) are captured.
- Everyone has a better day!