



Email sent immediately



Thanks for your
interest

Email sent 1 day later



Schedule a call

Email sent 3 days later



Here is your
quote!

The Game-Changing HVAC Automation Guide

INTRODUCTION

Work Less, Earn More — Let Automation Do the Heavy Lifting

You're juggling a million things: scheduling, follow-ups, invoices — all while trying to grow your HVAC business. It feels like there aren't enough hours in the day.

And while we can't clone you (yet), we can show you how automation can lighten the load.

With just a few simple automations, you can start saving time, streamlining your processes, and growing your business — all without hiring anyone or working around the clock.

Here's what's inside:



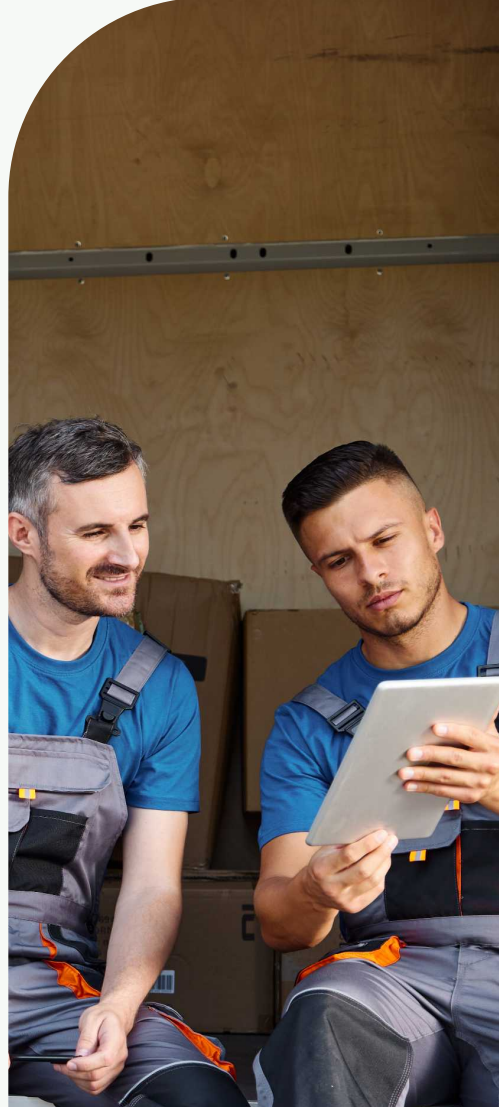
What automation is and what it isn't



The top 5 automations to start using today



How to get started with automations



What Is Automation?

Automation doesn't have to be complicated. It's simply using systems to do repetitive tasks for you — like sending appointment reminders, lead follow-ups, or invoices.

Think of it as putting busywork on autopilot, so you can focus on what you do best: Repairing and replacing HVAC systems.

The Myths

- ✗ It's impersonal
- ✗ It's complex
- ✗ It's expensive
- ✗ It's robotic

The Truth

- ✓ It creates thoughtful, personal touch-points
- ✓ It's simple to set up and run
- ✓ It saves you money by doing more with less
- ✓ It runs quietly in the background, freeing up your time

If it's repeatable, it's automatable.

By the end of this guide, you'll have a clear path to start automating the right parts of your business — giving you more time, less stress, and a system that works even when you're not.

The Top 5 Automations to Start Using Today

If you were to search “the top automations for small HVAC businesses,” you’d be inundated with dozens of options.

But here's the truth: you don't need to automate everything right away.

Start with these five simple, high-impact automations. They're easy to set up, will save you time, and make a noticeable dent in your daily to-do list.



Automation #1: Immediately follow up with potential new jobs

What it is: This automation sends a personalized email or text when someone fills out your website's contact form.

Why it matters: When someone reaches out, they're interested right now. And they'll likely move on to a competitor if you wait too long to respond. With this automation, you can instantly respond, even when you're busy.

What it solves:

- ✓ Leads slipping through the cracks
- ✓ Time spent on manual follow-up
- ✓ Having to monitor your inbox for leads throughout the day

What it looks like in action: When someone fills out a contact form on your website, they'll automatically receive a message to confirm you've received their information and let them know what to expect next.

Lead Follow Up

From HVAC Business

To

J

Jane Doe

X

Cc Bcc

Subject Line: We've Received Your Request!

Hi [First Name],

Thanks for reaching out! We received your HVAC repair request, and someone from our team will contact you shortly.

In the meantime, here's a quick overview of our services."

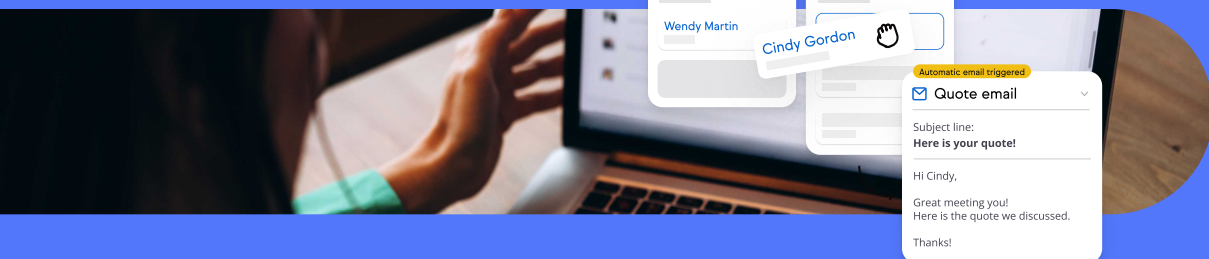
👉 [Insert Services Link]

Talk soon,

— [Your Name/Business Name]

Send

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The Top 5 Automations to Start Using Today



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Automation #2: Organize your job pipeline

What it is: A pipeline is a dashboard where you can quickly see the status of your entire workload at a glance. Set up a sales pipeline for converting leads into customers, and a job pipeline for tracking the status of service calls.

Why it matters: Staying organized is key to providing great customer service, and helps everyone in your business operate more efficiently.

What it solves:

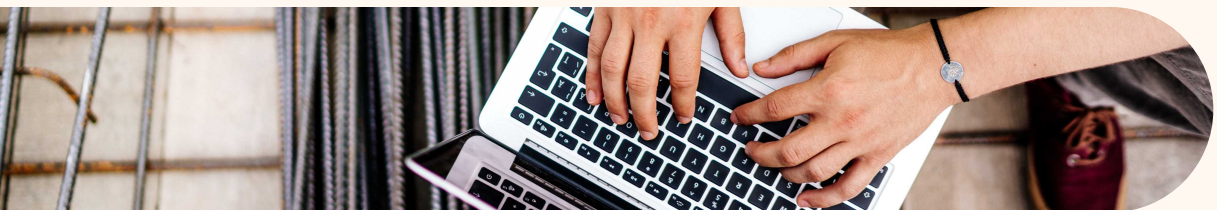
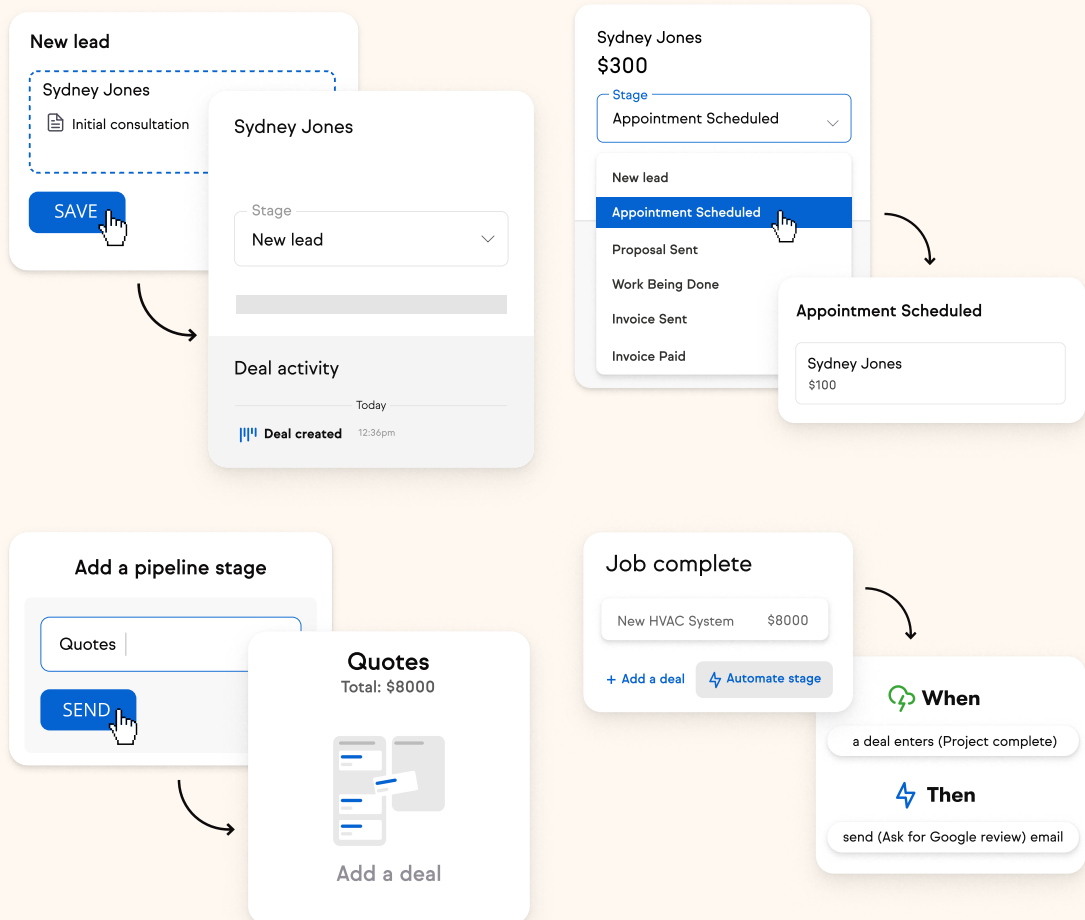
- ✓ Missed or forgotten follow-ups
- ✓ Time wasted looking up the status of jobs
- ✓ Job information stored in different systems
- ✓ Manual communications to customers

What it looks like in action:

Set up the stages that each job goes through. Assign a new job to the first stage, then drag and drop the job to the next stage as it moves forward in your process. You can even set up automation that moves jobs to the next stage when triggered by an action such as a received payment or applied tag. View your pipeline from your desktop or mobile app, so you have access whether you're in the office or in the field.



AUTOMATION #2



The Top 5 Automations to Start Using Today



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Automation #3: Gauge satisfaction and ask for referrals and reviews

What it is: After a job is complete, this automation sends a quick satisfaction survey and automatically follows up based on the customer's response. It can also ask for reviews and referrals.

Why it matters: Customer feedback is an invaluable source of intel. Whether it's praise or a problem that has surfaced, knowing how your customers feel can help you improve, grow, and build trust. In addition, collecting positive reviews can boost your reputation and help leads choose you over competitors.

What it solves:

- ✓ Manually having to ask each customer for a review
- ✓ Unhappy customers slipping through the cracks, never to return again
- ✓ Having to guess how you're doing and what customers think

What it looks like in action: Shortly after completing a job, this automation sends a thank you message plus a quick survey (see the example on the next page).

From there, you can add automation based on people's answers:

If the response is negative: A task is created for someone on your team to follow up. Quick outreach can turn a bad experience into a second chance.

If the response is positive: The automation sends another thank-you email and asks for a review or testimonial.

Review Request Email

From HVAC Business

To

J

Jane Doe

X

Cc Bcc

Subject Line: Thank you!

Hi, [First Name]!

Thank you for choosing us for your recent HVAC service – we really appreciate the opportunity to work with you.

We'd love to hear how we did.

How satisfied were you with your recent service?

😊 Completely satisfied

😐 Neutral

😞 Not satisfied

— [Your Name/Business Name]

Send

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🔗

😊

📎

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✍️

⋮

🗑️

Bonus tip: When a customer submits a referral, use another automation to create a task for you to call the new contact directly. Why a phone call? Because emailing someone without their permission can land you in the spam folder. A quick, friendly call builds trust and keeps your emails deliverable.

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The Top 5 Automations to Start Using Today



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Automation #4: Sell seasonal maintenance

What it is: This automation sends timely follow-ups to past customers, reminding them to book their next HVAC system tune-up every season — before they even realize they need to.

Why it matters: Your best customers have already said “yes” to you, making it easier to sell to them again. Seasonal system checkup reminders are a great way to get service calls booked *before* your busy season hits. Routine checkups can also reveal additional repair work that is needed, leading to additional sales.

What it solves:

- ✓ Customers going to a competitor
- ✓ Missed opportunities for repeat sales
- ✓ Manually tracking when each client is due for follow-up
- ✓ Gaps in your schedule during slower seasons

What it looks like in action: Once a job is complete, an automation timer starts. When the right amount of time has passed — say, six months after an HVAC tune-up — it sends a friendly reminder for the next tune-up.



AUTOMATION #4

Repeat Business Email

From HVAC Business

To

J Jane Doe

Cc Bcc

Subject Line: It's almost time for your next AC service!

Hi [First Name],

Temperatures are rising... now is a great time to schedule your annual air conditioning system checkup before your AC is working overtime — or not at all. Beat the heat (and the rush) and get on our calendar now:

👉 **SCHEDULE NOW** [Insert Booking Link]

If you have any questions, feel free to reply to this email — we're happy to help!

Looking forward to seeing you soon,

— [Your Name/Business Name]

P.S. As a loyal customer, you and a friend can each get 10% off your routine checkup service. Refer a friend here 👉 [Insert Referral Form Link]

Send





Bonus tip: Include a booking or product link like the example above so people can take action with one click — no searching, no hassle.

The Top 5 Automations to Start Using Today



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Automation #5: Automatically stay top-of-mind

What it is: This automation helps you stay connected with leads and customers over time — through thoughtful, timely messages that build trust and keep your business top of mind.

Why it matters: Whether it's a new lead who isn't quite ready to use your services or a past customer who might need you again, staying in touch helps you build a relationship and remain top-of-mind — without having to remember to follow up every time.

What it solves:

- ✓ Leads going cold due to lack of follow-up
- ✓ Customers forgetting about your services
- ✓ Time-consuming manual check-ins
- ✓ Missed opportunities to build long-term relationships and loyalty

What it looks like in action: You can set up different types of nurture automations depending on where someone is in their buying journey.

Short-term nurture:

After someone reaches out, send a series of helpful, bite-sized emails over the next few days or weeks. Share tips, FAQs, or a behind-the-scenes look at your services.

Long-term nurture:

For leads who need more time, send a monthly email with helpful content, seasonal reminders, or answers to common questions. Include a "Contact Us" link that triggers a task for your team to follow up when they're ready.

Short & Long Term Nurtures

From HVAC Business

To

J

Jane Doe

X

Cc Bcc

Subject Line: Seasonal HVAC Tips

Hi [First Name],

As winter approaches, here's a quick tip to help you prepare for the cold season:

[Insert a short tip — e.g., "How to make sure your furnace is ready for winter"]

If you ever need help or have questions, we're only a click away:

👉 [Insert Contact or Booking Link]

Talk soon,

— [Your Name/Business Name]

Send

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AUTOMATION #5

Customer check-ins:

A few weeks or months after a job is complete, send a friendly message to check in. Offer a discount or booking link to encourage repeat business.

Customer Check-Ins

From HVAC Business

To J Jane Doe ×

Cc Bcc

Subject Line: Just Checking In — How's Everything Going?

Hi [First Name],

It's been a little while since we last saw you, and we just wanted to check in and see how everything's going.

If you need anything or you're ready to schedule your next service, we'd be happy to help.

📅 [Insert Booking or Contact Link]

As a thank-you for being a valued customer, here's [insert offer — e.g., "10% off your next visit"]. We look forward to seeing you soon!

— [Your Name/Business Name]

Send ▼



Bonus birthday message:

Ask customers for their birthday (or their birthday month) when they first register with your business. Then, send a personalized message (and a special offer) on their big day. It's a small gesture that makes a big impression.

Birthday Message

From HVAC Business

To J Jane Doe ×

Subject Line: It's time to celebrate you!

Hi [First Name],

We hope you have a fantastic birthday!

Here's 15% off your next service — just our way of celebrating you.

— [Your Name/Business Name]

Send ▼



Not Sure Where to Start?

Start small. Build as you go.

You don't need to automate everything at once. Start with a few high-impact automations and build from there.

Your first 3 automations:



Follow Up with New Leads Instantly

Set up an automated email or text to go out when someone fills out your website contact form. It's fast, easy, and makes a big impression.



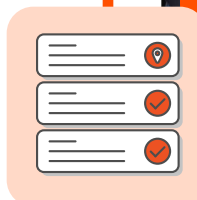
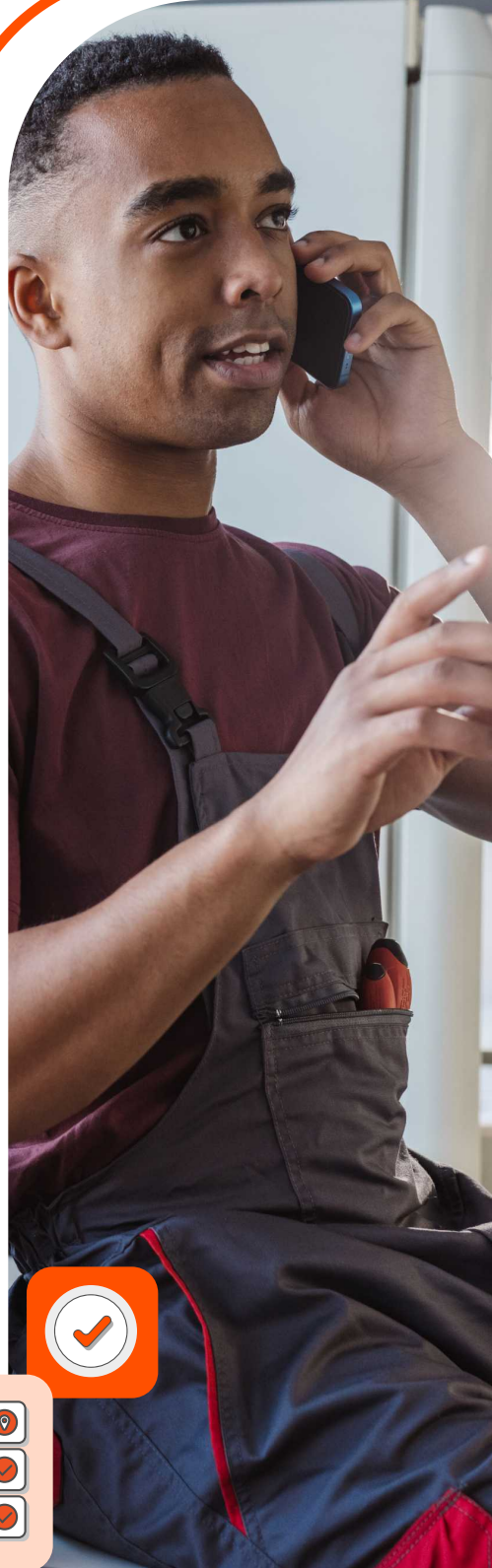
Organize Your Job Pipeline

Manage all your jobs from an easy-to-use dashboard and never lose track of a lead or job again.



Ask for Reviews After a Purchase

Send a quick survey and follow up based on the response. Happy customers? Ask for a review. Unhappy ones? Ask for a review just the same. Then, get notified to personally follow up and address their feedback.



Ready to Get Time Back?

You've seen how automation can help you:

- ✓ Instantly respond to potential jobs
- ✓ Stay on top of your service calls
- ✓ Ask for reviews and referrals
- ✓ Drive repeat business
- ✓ Stay engaged with potential and existing customers

So, what's next?

Meet Thryv — a powerful marketing and sales solution that has ready-to-use automations specifically for HVAC businesses, so you can hit the ground running.

Why Small Businesses Love Thryv

The Thryv platform was built for HVAC business owners who want powerful tools to grow your business. Our platform makes it easy to get started with automation, so you can save time and focus on doing more of what you love.

It's easy to get started:



Book a 1:1 Demo

Find out how [Thryv](#) can help your business with a personalized virtual demo.



Explore Our Automation Tools

[Discover what's possible](#) — and how simple it can be.



Get Help Setting It Up

We've got your back with [unmatched onboarding and support available 24/7](#).

 **[Visit Thryv.com](#) to learn more now!**

Thank you!

Thank you for downloading **The Game-Changing HVAC Automation Guide** — we hope you found it helpful!

Keep this guide handy as you build out your automations to make sure you don't miss any of the pro tips we've shared.

The sooner you start automating, the sooner you'll save time, reduce stress, and grow your business.

