ACROSS THE TABLE

BUSINESS CONSULTING

INDUSTRY STACK 12 · HVAC COMPANY

The HVAC Stack

Six systems for dispatch, diagnosis and the maintenance plans that make a seasonal business survivable.

Knowledge Article I12

AI Stack Series · acrossthetable.biz

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WHO THIS IS FOR

You run an HVAC, refrigeration or mechanical services company. Your year has two brutal peaks and two quiet stretches, your technicians are your capacity, and your most valuable asset is knowing what equipment is in which building.

This guide is for the owner who wants the quiet months to be less quiet and the busy months to be less chaotic. Those are the same problem seen from two ends.

The answer, in this trade more than most, is maintenance agreements.

START WITH THE WORK, NOT WITH THE APPS

These are not twenty lists of AI apps. Each stack starts with the jobs a particular business performs, then matches AI and conventional software to those jobs. Treat it as a menu to evaluate, not a shopping list.

For this kind of business the work runs in one line, start to finish:

> **THE PATH THE WORK TAKES**
> Lead → Dispatch → Technician → Repair → Maintenance

Broken into the steps a customer actually moves through:

- Customer
- Dispatch
- Technician
- Equipment history
- Diagnosis
- Repair
- Payment
- Maintenance plan

Read that line left to right. A customer calls, dispatch sends someone, the technician diagnoses, the repair happens, and the good version of this business is that the relationship becomes a maintenance plan rather than ending at the invoice.

Equipment history is the asset most HVAC companies undervalue. Knowing the model, the age, the last four service calls and the parts already replaced makes a technician faster, makes the diagnosis better, and makes the replacement conversation honest.

THE STACK, PIECE BY PIECE

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Every tool below is matched to one of those steps. You do not need all of them, and you should not buy all of them at once. Read the “What it is” column first and find the step where your business is losing the most time or money.

Tool	The step it covers	What it is	Price
ServiceTitan	Field-service management	Heavy-duty dispatch, sales and reporting for trades.	Custom pricing.
CompanyCam	Documentation	Time-stamped job-site photos organized by property, shared with the office.	Per user/month.
QuickBooks	Finance	The small-business accounting standard — books, invoicing, reporting.	Per month by plan.
ChatGPT / Claude	SOPs and communication	OpenAI’s general assistant — writing, analysis, research and, with Agent mode, multi-step work.	Free tier; paid plans per user/month.
Canva	Seasonal campaigns	Design everything else — decks, social posts, flyers, simple video — with AI help built in.	Free tier; Pro per user/month.
HubSpot	Customer retention	Customer records, marketing, sales and service in one platform.	Free CRM; paid hubs per month.

Where two names share a row with a slash between them, they do the same job and you pick one, not both. The description shows the first of the two.

Heavy dispatch software earns its cost at a certain size. A two-truck shop can run a lighter field-service tool and come back to this when the dispatch board stops fitting on a screen.

What to watch out for in each one

None of these are reasons not to buy. They are the things owners tell us they wish they had known first.

- ServiceTitan — Serious cost and onboarding. Not for a one-truck shop.
- CompanyCam — Crews have to take the photos.
- QuickBooks — Only as clean as your categorization habits.
- ChatGPT — It sounds confident when it’s wrong. Check anything that touches money, law or a customer.

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- Claude — Same rule as any assistant: verify facts and never paste data you wouldn't email.
- Canva — Easy to drift off-brand. Lock a brand kit.
- HubSpot — Costs step up sharply by tier and contact count.

WHERE AI ACTUALLY FITS IN THIS BUSINESS

Technician knowledge assistance, maintenance prediction, call summaries, customer education, seasonal campaigns.

In plain terms, that means:

- Giving a technician in an attic a plain-language answer about an unfamiliar unit, drawn from the manual, before they call the office.
- Reading service history across your customer base to flag which systems are likely to fail next season.
- Turning a technician's voice notes into a written service record that the next technician can actually use.
- Explaining to a customer, in writing they can show a spouse, why a repair is or is not worth it on a fifteen-year-old unit.
- Writing the seasonal campaign for tune-ups at the right moment each spring and fall.

A caution: AI reading a manual is helpful, AI diagnosing a system is not. Refrigerant handling, combustion and electrical work are licensed for good reason. The technician decides; the tool informs.

WHERE ACROSS THE TABLE FITS

A disclosure before you read this part: this is a product direction from Across the Table, which is my own company. Treat it as an idea to judge on its merits, the same as anything else in this guide.

A smart asset tag adds: equipment → tap → asset history → maintenance → technician record.

An asset tag on the equipment is interesting because the information you need is attached to the thing, not to a customer record someone has to search for. The technician scans, and the history is there.

WHAT TO SET UP FIRST

Do these in order. Finish one before you start the next. Most owners who try to do all of it in one month end up using none of it.

1. **Get dispatch and job history into one system** Who is where, what they are doing, and what was done at this address before. Everything in this trade improves when that exists.

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2. **Record equipment at every visit** Make, model, serial, age, condition. This builds the asset most competitors do not have, and it takes a technician ninety seconds.
3. **Photograph the work** Before and after, every time. It sells the replacement, defends the callback, and documents the condition you found.
4. **Build the maintenance plan offer** This is the strategic move in HVAC. Recurring revenue in the quiet months, first call in the busy ones, and a customer base you know the equipment of.
5. **Then add retention marketing** Seasonal reminders and tune-up campaigns to a list where you know the age of every system.

WHAT IT COSTS TO START

Full dispatch platforms are priced per user per month and are a serious commitment — they are built for shops with real dispatch volume. Below that size, lighter field-service software does the same essential job for much less.

Photo documentation is per user per month and is cheap next to one disputed callback.

The number that should drive your decisions is not the licence fee. It is revenue per technician per day, and whether the software increases it by reducing the time between calls.

The price column in the table above tells you how each one charges — per user, per location, per contact, or a percentage of every sale — not what you will pay. That is deliberate. The charging model is what decides whether a tool stays affordable as you grow, and it is the part that does not change every quarter. Get the current dollar figure from the vendor's own pricing page before you budget.

THE RULES UNDERNEATH ALL OF IT

Legal · Privacy · Data protection · Security · Compliance · Records · Audit · Risk · Human oversight — underneath every one of the twenty stacks, not an afterthought.

Refrigerant handling carries certification and record-keeping requirements. Those records must be retained and producible — keep them in a system, not in a binder in a truck.

Permits and inspections vary by jurisdiction and attach to the job record.

Technician hours, on-call time and travel are employment records with rules that differ by state. On-call pay in particular is a common and expensive mistake.

Equipment and property photographs are customer data. Have a rule about sharing them.

MISTAKES THAT COST THE MOST

- Running a trade business with brutal seasonality without maintenance agreements.

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- Not recording equipment details, so every visit starts from nothing.
- Dispatching by phone call and memory past the point where it fits.
- Quoting replacements without photos or history to support the recommendation.
- Letting the quiet season arrive without a campaign already written.

THE CEO DECISION

- What percentage of your customers are on a maintenance plan? What would ten points more be worth?
- Do you know the age and model of the equipment at your top hundred customers?
- What is revenue per technician per day, and what limits it?
- How do you fill the shoulder seasons — by plan, or by hope?
- Could you produce your refrigerant records this afternoon?

YOUR QUICK REVIEW

- ☐ Dispatch and job history live in one system.
- ☐ Equipment details are recorded at every visit.
- ☐ Technicians photograph before and after.
- ☐ Maintenance plans are offered on every qualifying job.
- ☐ Seasonal campaigns are written before the season starts.

ADDITIONAL RESOURCES

Tool	Where to find it	What it is for
ServiceTitan	www.servicetitan.com	HVAC, plumbing and electrical companies with several trucks.
CompanyCam	companycam.com	Proving what you found and what you fixed.
QuickBooks	quickbooks.intuit.com	Clean books your accountant already knows how to read.
ChatGPT / Claude	chatgpt.com / claude.ai	Your default thinking partner when you want one tool that does most jobs well.
Canva	www.canva.com	Small teams with no designer who still need consistent-looking work.

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Tool	Where to find it	What it is for
HubSpot	www.hubspot.com	Small businesses that want one system of record.
Across the Table AI Assessment	acrossthetable.biz/#assessment	Fifteen minutes. Tells you which job to start with before you buy anything.
The Scaling Edge	acrossthetablebiz.substack.com	Weekly newsletter for owners without a business background.

Go deeper on the pieces

Each of these is a full guide comparing the three tools that do that job:

- Ask and reason — acrossthetable.biz/knowledge-articles/ask-and-reason/ (covers ChatGPT, Claude)
- Make the deck — acrossthetable.biz/knowledge-articles/make-the-deck/ (covers Canva)
- Fill the pipeline — acrossthetable.biz/knowledge-articles/fill-the-pipeline/ (covers HubSpot)
- Manage the money — acrossthetable.biz/knowledge-articles/manage-the-money/ (covers QuickBooks)
- Market by email — acrossthetable.biz/knowledge-articles/market-by-email/ (covers HubSpot)

CONTINUE LEARNING

The Across the Table AI Assessment takes fifteen minutes and starts from what the business does.

The guides above compare the tools for each job in plain language.

READ AND CONNECT WITH ACROSS THE TABLE

Across the Table website: https://acrossthetable.biz

The Scaling Edge newsletter: https://acrossthetablebiz.substack.com

YouTube: https://www.youtube.com/@AcrossTheTableConnie

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