

Your Guide to Next-Level HVAC Business Success

How to calm the chaos and reach the next phase of growth.

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If you're reading this guide, you're an HVAC business owner or office manager. Maybe your business is growing. Maybe you want more — more money, more technicians, more service calls. Or maybe the more you grow, the more chaotic things get. Maybe all these things are true.



Does any of this sound familiar?

- You started your company because you're great at what you do, but you find yourself spending more time working *in* your business than *on* your business
- Your dispatcher is overwhelmed
- It takes too many touches from too many people to complete a service call
- Day-to-day operations are difficult and messy, with the office staff bearing most of the stress
- Good techs are increasingly difficult to find and keep

It's okay if things are messy right now. Use this guide to navigate the pitfalls of each phase of growth and learn what it takes to get to the next level.

PHASE 1: SO YOU'RE STARTING A BUSINESS...

... or maybe you just haven't quite hit the million-dollar mark yet. Either way, here's what you're up against during this phase and how to make that first million.

Potential pitfalls:

One of the biggest difficulties at this stage is striking the right balance between adding staff and managing spend. In the beginning, you might have a family member running the business while you're in the truck all day. And this works for a while, but then you decide to bring in an employee.

Since you want that employee to work at the level your customers have come to expect, you now have people management on your plate, and payroll and benefits for your office manager to deal with. It's also becoming harder to find and attract reliable techs, so you may have to incentivize top talent with higher pay to join you on the ground floor.

What does it all mean? Complexity and cost can be challenges as you try to grow your business. This guide can help you keep costs from steamrolling you by focusing on smart growth and efficiency.

How to reach the next phase:

- Let go of working in the field; learn new management skills
- Simplify payroll; avoid spiffs and complex hybrid pay systems

Make these additions to management:

You! You're no longer a tech. Get out of the truck and come into the office to work on managing the business.

How Sera can help:

Sera's management portal and dashboards give you the insight you need to quickly understand your profitability, cash flow, and operating efficiency. You'll have the data you need to know when it's time to hire more techs and when your techs are operating at peak efficiency.

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Phase 1

- Revenue 0-\$1 million
- Owner in the field and 100% involved in day-to-day business

PHASE 2: MOVING INTO MANAGEMENT

So, you're a manager now. Managing people is a lot harder than it sounds. But if you want to grow your business, you've got to empower your employees to embody your best traits, to become managers themselves, and to put your customers first. And you've got to get out of the truck to do it. Here's how to make the growing pains of Phase 2 a little easier.

Potential pitfalls:

Ever heard the saying "with great power comes great responsibility"? Well, the same can be said for growth. In Phase 2, you're going to begin generating more revenue. But you may realize that your cash flow isn't great. Maybe as an owner you find yourself making less than the guys in the field.

You may also find that your office staff is completely overwhelmed. It's probably just one person who's not only doing payroll, but also dispatching and doing the books. Plus, seasonal lulls may mean you can't keep the techs you've hired busy during the cooler months.

How to reach the next phase:

- Move out of the field full time; let go of more responsibility in the day-to-day business
- Hire a dispatcher to lift the burden off of administrative staff
- Start your membership program to stay busy all year and fund marketing activities
- Implement weekly meetings to teach employees skills like active listening, customer service, and personal finance

Make these additions to management:

You'll begin managing multiple employees as you grow through Phase 2.

Phase 2

- Revenue \$1-3 million
- Owner moves out of the field and 100% working in the business
- Weekly meetings
- Managing multiple employees

How Sera can help:

Sera can not only help you see and manage profit margins and tech/job efficiencies, but we also help with the organizational skills and education you need to grow your business.

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PHASE 3: CULTURE IS CRITICAL

In Phase 2, the owner tends to manage all the technicians and the people in the office. But as you grow, you must let go. You'll need to trust someone else to be who you used to be. This might be the hardest thing to do as your business grows – building trust in your employees, making good hires, and promoting them when the time is right. Phase 3 is the time to make what could be the most uncomfortable changes for you as an owner.

Potential pitfalls:

What we tend to hear from most contractors who are “stuck” at three million in revenue is that they're still running the business by themselves. They don't have management in place. And that's a red flag that there's no company culture in place to create a solid foundation for employee or revenue growth.

This is why Phase 3 can be either extremely frustrating or extremely profitable. At \$3-5 million in revenue with no managers, there's more money available for the owner. Adding managers creates more cost, but it's during this

phase that your company needs to evolve into a different kind of business.

How to reach the next phase:

- Invest in your people
- Build the right tech-centered culture
- Align everyone – field and office – around the same goals (satisfied customers!)
- Manage through managers; learn to let go!

Make these additions to management:

Department managers (install manager, HVAC manager, office manager, etc.)

Phase 3

- \$3-5 million
- Owner manages through managers
- Develop the culture

How Sera can help:

During this time of big cultural and personnel changes, the efficiencies you gain with Sera (cutting the time it takes to do payroll down from days to hours, for example) can simplify the routine tasks you and your leadership team are responsible for so that you can take the time you need to focus on the big picture for your business.

Our onboarding experts and educational resources can also equip you with the knowledge you need to build a winning culture.

Ready to learn more?

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“Stop putting things in place that cause your hair to be on fire every day. You do this through simplification and efficiency and then create your culture around those two things.”

— Billy Stevens, *Sera Founder* 🍄

PHASE 4: MULTI-LEVEL MANAGEMENT

This phase is when things get awesome. You've made it through the high failure rate of Phase 1 and honed your leadership skills in Phases 2 and 3. Now it's time to literally take those skills to another level.

Potential pitfalls:

This is also where things can get complicated. How do you add managers for your managers? Do you have a farm system? Do you bring someone up through the business, or do you hire an experienced executive from outside the company? At this point, you are part of the less than 5% of companies in this industry to reach this phase.

You have important decisions to make, but you also have success to celebrate. You have done the hard work, you've built this business, you've gone through all the obstacles, and this is when you should be really hitting it on all

cylinders. This is where you should have 500 memberships for every million of revenue. This is where you are the preferred provider in your area. This is where you have a customer base that loves your company and will use you over and over again.

How to ensure continued success:

- Keep adding memberships
- Continue to create satisfied customers
- Make culture a priority
- Keep it simple

Make these additions to management:

Executive team/department heads

How Sera can help:

The biggest benefit Sera offers contractors and their staff is simplicity that drives profitability. As you move through each phase of growth with Sera, you'll start to see how the software calms the chaos so that you can focus on building the business.

Ready to learn more?

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Phase 4

- \$5 million+
- Owner manages the executive team
- 100% working on the business
- Meetings conducted by department managers

“It’s time to simplify what they’re doing, what you’re doing, and make this thing grow the way it should and have happy customers that continue to tell everyone about you.”

— Billy Stevens, *Sera Founder* 🐾.

SOFTWARE THAT BUILDS YOUR BOTTOM LINE

Learn why home service contractors trust Sera to revolutionize their businesses and increase productivity.

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Interested but not ready to speak with someone? Watch our recorded demonstration to understand how Sera can make your business more efficient and improve your bottom line.

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