Growth Action Plan

PeakFlow HVAC Services | AI

Lead: Marcus Lee | Primary Goal: Save time with AI

Industry: Home Services (HVAC)
Team Size: 24 employees

Traffic/Users: ~7,200 monthly visits; 310 monthly service requests
Expected first measurable gains: 2-6 weeks

1) Executive Summary
- Likely bottleneck: Request triage and follow-ups are handled manually across phone, email, and SMS.
- Fastest path: Automate request classification + urgency routing
- Expected impact: Cut response lag by 30-40% (High confidence).
- Context: Dispatch and support teams manually triage service requests, quote follow-ups, and technician scheduling updates.

2) Opportunity Diagnosis
- Primary: Request triage and follow-ups are handled manually across phone, email, and SMS.
- Secondary: Leads cool down before quote reminders are sent.
- Assumption: Assumes CRM has pipeline stages and webhook access.

3) 30-60-90 Plan (Outcome-Based)

Window	Focus	Action	Impact	Confidence
0-30 days	Lead Triage	Automate request classification + urgency routing	Cut response lag by 30-40%	High confidence
31-60 days	Follow-up	Auto-send quote nudges based on job type and timing	Lift close rate 8-12%	Medium confidence
61-90 days	Ops	Generate daily technician prep summaries from tickets	Save 6-10 ops hours/week	Medium confidence

4) Top 5 Priority Actions
1. Define triage tags for emergency, maintenance, and replacement requests.
2. Use AI to draft personalized follow-up texts within 5 minutes of quote delivery.

Projected KPI Direction (30/60/90)

3. Add missed-call AI callback workflow for after-hours leads.
4. Create escalation rules for premium contracts and repeat customers.
5. Track and prune low-performing message templates every week.

30d   60d   90d

5) Offer Recommendation + KPI Scorecard
Recommended: AI Automation (Primary). Track weekly: First-response time, quote-to-close rate, dispatch admin hours.

6) Risks & Mitigation
- Risk: Bad lead routing. Mitigation: human override for first 2 weeks.
- Risk: Message fatigue. Mitigation: frequency caps and channel preference.
- Risk: Data quality gaps. Mitigation: enforce required fields at intake.

7) Immediate Next Step
Implement an AI-powered missed-call recovery and triage flow for one service region in the next 7 days.

"If useful, I can turn this into a hands-on execution sprint with milestones, owners, and delivery dates."

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