

The HVAC Owner's Guide to Agency Accountability

The 12 Questions Most Owners Never Ask
(And Why That's Costing Them \$200K/Year)

HOW TO USE THIS CHECKLIST

- Pick your top 5 questions — don't interrogate with all 12 at once.
- Schedule a 30-minute call with your agency. No slideshow needed.
- Listen for data and specifics vs. vague or defensive answers.
- Score each answer: Great / Needs Work / Red Flag.

The 12 Questions

Q1 What's our cost per booked job—not cost per lead—broken down by channel?

✓ GOOD ANSWER:

Names specific CPB numbers by channel with a tracking spreadsheet.

✗ RED FLAG:

"We track leads, not bookings" or pushes CRM reporting back to you.

Q2 How many active A/B tests are running right now, and what are you testing?

✓ GOOD ANSWER:

Lists specific tests currently running across copy, landing pages, or bids.

✗ RED FLAG:

"We continuously optimize with our AI system" — nothing concrete.

Q3 What percentage of our ad spend goes to unqualified traffic, and how are you reducing it?

✓ GOOD ANSWER:

Gives a % with a before/after trend and specific exclusion actions taken.

✗ RED FLAG:

"We use broad match to capture maximum opportunity."

Q4 Do you have access to our CRM data, and do you review close rates by lead source monthly?

✓ **GOOD ANSWER:**

Has live integration with ServiceTitan; reviews close rate and avg ticket by source monthly.

✗ **RED FLAG:**

"Send us an export from your CRM" — they aren't proactively looking.

Q5 When was the last time you refreshed our ad copy, and what's your cadence for updates?

✓ **GOOD ANSWER:**

Names a specific recent update and describes a 30-60 day review cadence.

✗ **RED FLAG:**

"If it's not broken, we don't fix it" — your ads are likely stale.

Q6 What HVAC-specific benchmarks are you using, and how do we compare?

✓ **GOOD ANSWER:**

Cites HVAC conversion benchmarks (8-12% replacement, 4-6% maintenance).

✗ **RED FLAG:**

Compares you to generic "home services" industry averages.

Q7 How are you adjusting strategy for seasonality, and what's the plan for shoulder seasons?

✓ **GOOD ANSWER:**

Has a proactive seasonal plan 60+ days out; addresses shoulder season specifically.

✗ **RED FLAG:**

"We'll increase budget when the busy season starts" — reactive, not strategic.

Q8 What's our LSA Top Impression Share and Absolute Top Impression Share, and what are you doing to improve them?

✓ **GOOD ANSWER:**

Tracks both metrics monthly; actively manages reviews, response time, and disputes.

✗ **RED FLAG:**

"LSA is mostly automatic — we just keep the profile updated."

Q9 Show me our report in one page. What's working, what's not, and what are we changing?

✓ **GOOD ANSWER:**

Produces a one-page summary: spend, leads, booked jobs, CPB, and 3 action items.

✗ **RED FLAG:**

"Our reports are comprehensive — simplifying loses important context."

Q10 If you found a way to get us the same results for 30% less spend, would you tell us?

✓ **GOOD ANSWER:**

Acknowledges the fee impact honestly and gives a real example of reducing spend.

✗ **RED FLAG:**

Deflects, changes subject, or says "more spend always equals more results."

Q11 What's our Search campaign conversion rate, and what are your benchmarks?

✓ **GOOD ANSWER:**

Names specific conversion rate by campaign; targets 20%+ with clients reaching 45% at 12 months.

✗ **RED FLAG:**

"CRO is a separate service" — they're not connecting traffic to outcomes.

Q12 What are the top 3 opportunities in our account right now, and why haven't we done them yet?

✓ **GOOD ANSWER:**

Rattles off 3 specific opportunities with a timeline for execution.

✗ **RED FLAG:**

Long pause, vague answer, or "we've already optimized everything."

Score Your Agency

9–12 Great Answers

You have a strong agency partner. Keep this cadence quarterly.

5–8 Great Answers

Some gaps exist. Share this checklist and set a 30-day improvement timeline.

0–4 Great Answers

You're likely overpaying for underperformance. Time to have a hard conversation — or make a change.

Your Next Steps This Week

1

Email your agency

Use the template at ElevatedHVACMarketing.com/toolkit to request a 30-min accountability call.

2

Pick your top 5

Don't use all 12 at once. Choose the questions where you feel least informed today.

3

Listen for data

Good agencies have numbers. Struggling agencies have explanations.

4

Make your decision

Great partner? Keep going. Red flags? Let's talk.

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