

The First 90 Days

Post-Close Integration Playbook for Commercial HVAC Acquisitions

This checklist covers every major action item from the two weeks before closing through Day 90 after acquiring a commercial HVAC service business. Organized into four sequential phases, it reflects Homestead's operational approach: stabilize first, then integrate, then grow. Use it as a living operational document — check items off, add notes, and adapt the timeline to your specific deal.

Phase	Days	Focus	Items
Pre-Close	-14 to 0	Legal, licensing, systems, communication prep	28
Phase 1: Stabilize	1 – 30	Team, customers, operations, financial baseline	38
Phase 2: Integrate	31 – 60	SOPs, financial controls, brand, people	34
Phase 3: Optimize	61 – 90	Growth, KPIs, leadership development	30
TOTAL			130

Core Principle: Earn trust before earning efficiency. Stable operations before systems changes. Relationships before rebranding. A business that runs smoothly at Day 30 is more valuable than one that's been "optimized" and lost two technicians in the process.

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DAYS -14 TO CLOSE

Pre-Close Preparation

28

action items

The two weeks before closing set the tone for Day 1. Complete every item below before signing. Nothing here is optional.

LEGAL & ADMI

Entity, Licenses & Insurance

Complete Before Close

- Asset purchase agreement or entity transfer fully executed
- HVAC contractor license transfer or new license application initiated
Illinois requires a licensed contractor of record — confirm before Day 1
- State and local business licenses transferred or newly registered
- General liability insurance active and properly named under new entity
- Workers' compensation policy transferred or new policy bound
- Commercial auto insurance transferred for all fleet vehicles
- Lease assignment signed or new lease executed for office/shop space
- All vehicle titles transferred and re-registered
- Equipment and tool inventory signed off by both parties
- Non-compete and transition services agreement executed with seller
- Employee offer letters / continuity agreements prepared for all staff
Written confirmation of role and pay before Day 1 — non-negotiable
- Banking and payroll accounts set up and verified under new entity

OPERATIONS

Systems Access & Operational Handoff

Complete Before Close

- All service software logins documented and transferred
ServiceTitan, Successware, FieldEdge, or equivalent
- Customer database exported and accessible
- Open service orders and scheduled jobs reviewed — nothing drops on Day 1
- Complete vendor/supplier list with contacts, account numbers, and credit terms
- Company email accounts and domain access transferred
- Google Business Profile and all review platforms access confirmed
- Answering service and phone system credentials transferred
- All service agreements (contracts) fully documented and accessible

COMMUNICATIO

Team & Customer Notification Plan

Draft Before, Deploy at Close

- All-hands announcement scripted — seller introduces Homestead, affirms continuity

The seller's voice carries more weight than anything you say. Plan this carefully.

- Individual notification strategy for key personnel prepared

- Customer announcement letter drafted — warm, professional, continuity-focused

- Top 10 customers identified for personal calls in Week 1

- Vendor/supplier payment continuity notification prepared

- Day 1 agenda confirmed with seller — joint appearance with team planned

- Transition period schedule agreed with seller (typically 60–90 days)

- First-week dispatch schedule confirmed — no service gaps

PHASE 1 · DAYS 1–30
01 Stabilize

38
action items

One overriding priority: keep everything running. No major changes. No rebranding. No system overhauls. Earn trust before you earn efficiency.

WEEK 1

People Before Everything

Days 1–7

- Day 1 all-hands meeting — seller-led introduction, Michael present
Keep it short. Affirm: jobs secure, pay unchanged, nothing changes today.
- One-on-one with every field technician (30-min listening sessions)
Ask: What works? What frustrates you? What would you change? Listen. Don't commit yet.
- One-on-one with office manager/dispatcher — understand daily rhythm
- Confirm dispatch and scheduling is uninterrupted — zero service gaps in Week 1
- Review all open service orders and active job statuses
- Confirm first payroll run under new ownership is accurate and on time
Nothing destroys trust faster than a payroll problem in Week 1. Triple-check.
- Daily 30-minute check-in with seller through first week
- Banking and financial accounts fully activated and accessible
- Identify 2–3 informal leaders on the team — invest extra relationship time here
Every team has unofficial influencers. Win them and the rest follows.
- Review all active service agreements — confirm documented, renewal dates flagged

WEEK 2

Operational Inventory

Days 8–14

- Complete fleet/vehicle audit — condition, registration, insurance, maintenance history
- Complete tools and equipment audit — assign to technicians where applicable
- Review warranty obligations on recent installations — flag open callbacks
- Confirm all technician certifications current: EPA 608, NATE, OSHA 10/30
- Review safety protocols — OSHA compliance for HVAC work confirmed
- Compile master vendor list with credit terms, contact names, account standing
- Review accounts receivable aging — flag invoices over 60 days
Old A/R often reveals relationship issues or disputed work. Know the story first.
- Review accounts payable — identify upcoming obligations and cash flow timing
- Identify any deferred maintenance on shop, office, or equipment

WEEK 3

Customer Relationship Assessment

Days 15–21

- Personal calls to top 10 customers — owner-to-decision-maker, not a salesperson
These are relationship calls, not retention pitches. Introduce yourself and listen.
- Review all service agreements — terms, renewal dates, pricing vs. current costs
- Identify at-risk customer relationships or ongoing disputes
- Review customer complaint history from prior 12 months
- Identify customers with lapsed/expired agreements — flag as reactivation opportunities
- Send first Homestead-branded customer communication — transition announcement
- Confirm emergency service coverage protocol and customer-facing messaging is consistent

WEEK 4

Financial Clarity

Days 22–30

- P&L reconciled for prior 12 months under new ownership lens
- Gross margin analyzed by service type: maintenance, repair, install, emergency
- Overhead structure reviewed against revenue — identify non-essential expenses
- Pricing benchmarked against local commercial HVAC market
- Top 20% of revenue-generating customers identified — Pareto analysis complete
- Month-end financial close procedure established — who does what, by when
- Phase 1 summary report completed — findings, risks, decisions deferred to Phase 2
- Team retention status assessed — any flight risks identified and proactively addressed
- Technician skills assessment complete — training needs identified

PHASE 2 · DAYS 31–60

02 Integrate

34
action items

Build the operational infrastructure. Establish financial controls. Close the gap between how the business runs today and how it should run at full potential. Brand integration begins — gradually and with team involvement.

OPERATIONS

Systems, SOPs & Field Operations

Days 31–45

- SOPs documented for dispatch, scheduling, and service delivery
Write these with the existing team — not imposed from outside. Ownership improves compliance.
- Technician performance scorecards introduced — KPIs communicated clearly and positively
- Call-back rate and first-time fix rate baseline established
Target: callback rate <5%, first-time fix rate >85%. Set targets only after baseline data.
- Service software fully configured for Homestead operational standards
- Job costing system implemented — track labor, materials, overhead per job
- GPS and fleet tracking active on all vehicles — review against dispatch logs
- Materials purchasing consolidated — vendor agreements reviewed for pricing improvement
- Technician on-call rotation formalized and documented
- Safety program fully documented — toolbox talks scheduled, incident reporting clear

FINANCIAL

Financial Controls & Pricing

Days 31–60

- Monthly financial reporting cadence established — P&L, balance sheet, cash flow
- Budget vs. actual tracking live — first variance reviewed and explained
- Service agreement profitability analysis complete — identify money-losing contracts
Many HVAC SAs are priced below cost. Flag now; renegotiate at renewal.
- Pricing model reviewed — T&M rates, flat-rate book, install margins
- Pricing adjustments made where warranted — communicate rationale to team first
- A/R collections process strengthened — accounts over 90 days addressed directly
- Chart of accounts reviewed and updated to Homestead standards
- Year-1 budget drafted based on actual run-rate and growth assumptions

PEOPLE

Team Integration & Retention

Days 31–60

- 30-day check-in with all staff — formalized, documented, honest
- Key employee retention confirmed — flight risks proactively addressed

- Personnel gaps identified — recruiting initiated for open or needed roles
- Compensation review complete — adjustments made or planned and communicated
- Performance expectations clearly communicated — written job descriptions updated
- Technician training needs identified — manufacturer certifications or skills gaps

BRAND

Brand Integration

Days 45–60

- Second customer communication sent — Homestead brand introduction, warmer tone
- Business cards, uniforms, vehicle wrap timeline established
Don't rush this. Involve the team in the rollout.
- Google Business Profile updated — name, ownership, description, photos
- Phone greetings and email signatures updated to reflect new ownership
- Review response strategy established — all new Google/Yelp reviews within 48 hrs
- Website and online presence updated

PHASE 3 · DAYS 61–90

03 Optimize & Grow

30
action items

The business runs smoothly. Now build the operational performance indicators that drive value, expand the commercial customer base, and develop the leadership structure that will run the business at scale.

GROWTH

Commercial Account Development

Days 61–90

- Commercial account target list built — minimum 20 new prospects in service area

Focus on property managers, building owners, facility directors, GCs.

- Service agreement renewal campaign launched — all SAs renewing in 90 days contacted

- Lapsed customer outreach campaign started — former customers re-engaged

- Referral partner outreach initiated — property managers, mechanical engineers, GCs

- Seasonal promotion planned and activated

- First net-new commercial account signed under Homestead ownership

- Service agreement count vs. close-day baseline tracked

- Online reputation actively built — review request process deployed post-service

OPERATIONS

Operational Excellence

Days 61–90

- Full KPI dashboard operational — revenue, margin, tech utilization, SA count, callbacks

- Technician utilization rate established and optimized — target 72–80% billable hours

- Preventive maintenance completion rate tracked — target 90%+ on-time

- Customer satisfaction tracking deployed — post-service follow-up process live

- Service response time SLAs set and tracked — emergency vs. standard

- Parts and materials inventory reviewed — stocking levels optimized

- Fleet preventive maintenance schedule implemented — all vehicles on service intervals

LEADERSHIP

90-Day Close & Leadership Development

Days 75–90

- Field supervisor/lead technician identified and given expanded responsibilities

- Dispatcher/office manager operating independently — seller handoff complete

- Seller transition period formally concluded — TSA fulfilled

- First formal employee performance reviews scheduled

- 90-day retrospective completed — what worked, what didn't, what changes needed

Year-1 operating plan finalized and shared with key team members

Team milestone celebration planned — culture momentum matters

A team lunch, a small bonus, a public acknowledgment. Say: we made it together.

Next acquisition criteria updated based on learnings from this deal

KEY PERFORMANCE METRICS REFERENCE

Metric	Target	Track
First-time fix rate	85%+	Monthly
Callback rate	<5%	Monthly
Technician utilization	72–80%	Weekly
PM completion rate	90%+	Monthly
Gross margin (service)	Track by type	Monthly
A/R aging >60 days	Minimize	Weekly
Service agreement count	Grow monthly	Monthly
Revenue per technician	Benchmark & improve	Monthly

Questions? Ready to Talk?

This checklist is part of Homestead's full 90-Day Integration Guide, available at homesteadsp.com/first-90-days-after-acquiring-an-hvac-business/. If you're a commercial HVAC business owner considering your options, schedule a confidential conversation at homesteadsp.com/contact/.