

Sample assessment: quoting and compliance for a residential HVAC contractor

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This is the document a client receives at the end of the assessment week, reproduced in full. The company is invented; the constraints are the kind I would actually verify.

This is a sample. Heating & Air Experts is not a real company. The point is to show what a \$2,000, one week assessment looks like before you buy one.

The company

Eight people. Residential furnace, AC, and heat pump replacement across Alameda and Contra Costa counties, with occasional work in San Francisco. One person in the office writes every quote. Around twelve quotes go out in a normal week. They use QuickBooks Online for invoicing and there is no field service system. Quotes are built in a spreadsheet (Google Sheets), exported as PDFs, and emailed to clients.

That setup is not broken. It is just carrying more of the business than it was meant to.

What I looked at

Five working days, two of them on site.

- Two mornings with Jennifer, who writes the quotes, watching four go from site notes to sent PDF.
- One morning riding along on a replacement job.
- Forty minutes with Marco, the owner, talking through what he wants to know and cannot currently see.

- The quoting spreadsheet.
- Eighteen months of sent quote PDFs in a shared Google Drive folder.
- Read-only access to QuickBooks Online.
- The permit and compliance assumptions Jennifer uses when she prices work.

I did not look at service calls or maintenance contracts. Those are priced differently and were outside the job we discussed. If they come in later, the requirements change.

How quoting works now

A lead comes in by phone or through the website. Someone books a site visit. Marco or one of the leads goes out, measures, and writes the details on a paper form. A photo of the form gets texted back to the office.

Jennifer opens a recent quote, saves a copy, and edits it. Equipment pricing comes from a supplier PDF. Labor comes from a rate she knows. Markup varies by job type. Then she works through the permit and compliance items. That last part is where most of the real knowledge sits.

A quote may need a different permit allowance depending on the city. Some jobs need more than one permit. Local electrification rules can also change what can be quoted at all. In some cities a gas furnace may not be an option, which means different equipment, labor, and permit costs. California's Title 24 rules can add required paperwork, testing, and outside verification before the job can be signed off. Duct testing can also uncover extra work that nobody can know about when the quote is written.

Some of those are fixed costs. Some are rules. Some are conditions.

The spreadsheet does not know the difference. Jennifer does. She also knows which supplier prices are current, which line items are stale, and which exceptions are real exceptions rather than something somebody did once three years ago. None of that is written down in one place.

When Jennifer was out for a week in February, two quotes went out with the wrong permit assumption. One was wrong by enough that Marco noticed. That is the part I would treat as the problem.

Not "the spreadsheet is ugly." The spreadsheet works well enough. The problem is that the quoting process depends on one person's memory.

What it costs today

Jennifer spends somewhere between forty and ninety minutes on a quote and sends about twelve a week. A lot of that time is lookup, copying, and arithmetic rather than judgment. Accepted quotes then get retyped into QuickBooks. That adds another couple of hours most weeks.

The bigger problem is harder to price. Of the eighteen months of quotes I looked at, a little over half have no recorded outcome. There is no reliable answer to:

- how many quotes were won last quarter;
- what kinds of work were won;
- what went stale without a follow-up;
- whether a job was lost on price or simply never closed out.

I would not turn that into a fake savings number. The honest version is that the company cannot currently answer "how many quotes did we win last quarter, and on what?"

That is worth fixing before it is worth optimizing.

What the software has to do

1. Hold equipment, labor, markup rules, permit assumptions, and compliance costs as data in one place.
2. Let Jennifer update those values without touching code.
3. Know the jurisdiction. Pick the city and show the permit assumptions and any local restrictions that affect the quote.
4. Carry conditional items clearly. If duct sealing may be needed after testing, the customer should see that before signing.
5. Build a quote from line items instead of copying last month's spreadsheet.
6. Produce a PDF that looks close enough to the current one that customers and staff recognize it.
7. Send the quote and let the customer accept or decline with a link.
8. Turn an accepted quote into a job with a status.
9. Show outstanding quotes and how old they are.
10. Export accepted jobs in a form QuickBooks can import.
11. Track the compliance sequence far enough that an install cannot quietly disappear between permit, verification, and final.

12. Be usable by one non-technical person after an afternoon of training.

Items 1 through 4 are the reason I think custom software is justified here.

The rest is forms, statuses, and plumbing.

What I'd build

A desktop-first quoting tool for the office. The first screen is the quote list: draft, sent, accepted, declined, and stale.

A new quote starts with the customer, address, job type, and city. The city selection pulls in the current permit assumptions and any rules that affect what can be quoted. From there Jennifer picks equipment and labor items from the price list. The markup and compliance rules apply in the background. Anything conditional stays visible on the quote instead of disappearing into a note.

The quote preview should look close to the PDF they send now. I would not redesign it just because I can. Jennifer already knows how to check that document, and customers already know how to read it.

The customer gets an email with the PDF and a plain accept-or-decline link. No account. No password. An accepted quote becomes a job. The job has a short compliance checklist and a status.

QuickBooks stays where it is. The new tool exports the accepted job in the format we agree on during week one.

The part I would spend the most care on is not the PDF or the accept button. It is how the pricing and compliance rules are stored, because that is where the company's knowledge currently lives.

What I'd leave alone, and why

Invoicing. QuickBooks already handles tax, payment matching, and the accountant's workflow. Rebuilding that would cost money to produce something worse.

Scheduling and dispatch. It is a real problem. It is also a different problem with different users. Doing both at once makes the first project larger and harder to judge. If quoting works, scheduling is an obvious second piece.

A customer portal. These customers are homeowners buying an HVAC system, not people who need a long-running workspace. An emailed PDF and an accept link are enough.

A native mobile app. The crews already photograph forms and text them back. That is crude, but it works. The quoting tool is used at a desk.

Two-way QuickBooks sync. Possible, but not where I would spend the first dollar. One-way export gets most of the value with much less failure surface.

Rebate eligibility logic. Program rules change too often. I would give staff a place to record the decision, not pretend the software can make it forever.

The off-the-shelf question

I would rather raise this here than have you discover it after paying for a build.

Jobber and Housecall Pro both cover a lot of what Heating & Air Experts needs. They handle things I am explicitly leaving alone, including scheduling, dispatch, invoicing, and customer communication. For many contractors this size, I would tell them to buy one.

The reason I would not stop there here is the way the company prices work.

The quote changes depending on the city. Some items apply only in certain places. Some costs depend on something that has not happened yet. Local rules can also change which equipment can be quoted at all. Those are not edge cases. They are part of how Heating & Air Experts works out a price.

If Marco is willing to simplify that, my recommendation changes. For example, he could use one permit allowance, one compliance charge, and absorb the difference between cities. If that works for the business, off-the-shelf software probably makes more sense. It is cheaper than custom software, and I would take that option seriously.

Scheduling could change the answer too. If Heating & Air Experts expects to replace the whiteboard with proper scheduling and dispatch in the next year, buying a field-service product now and living with a quoting workaround may be better value than building this tool and then paying for a second project.

The custom build only makes sense if these quoting rules are worth keeping.

Risks and unknowns

The permit data will go stale. Cities change fee schedules. The system should keep those values in one place, show when they were last checked, and make them easy to update. Somebody at Heating & Air Experts has to own keeping them current.

The compliance rules will change. The rules should be editable where possible rather than buried in the software. Otherwise today's rules become tomorrow's bug.

The compliance rules have never been written down. Most of what I know came from Jennifer explaining them while she worked. I would want them confirmed before development starts. If there are more exceptions than we have found, I want to know that before building, not halfway through.

The price list needs cleaning. There are stale and duplicate items. Importing them as-is would put the same mess behind a nicer screen. Heating & Air Experts needs to clean the list first, and I would expect that to take roughly two days of Jennifer's time.

One person is the whole quoting process. The first version assumes Jennifer's workflow. If a second person starts quoting, some of those assumptions may need to change.

Supplier pricing has no automatic feed. Updates stay manual unless the supplier provides one later. The software can make those updates happen in one place, but someone still has to enter them.

The QuickBooks export is not proven yet. I have read the chart of accounts, but I have not run a real import. I would test that at the start of week one. If the format is awkward, the export gets less elegant. It does not threaten the rest of the project.

Price and schedule

\$6,500. Three weeks from kickoff.

The \$2,000 assessment fee comes off the build price if you go ahead with me, leaving \$4,500.

Included:

- the quoting tool described above
- editable pricing and compliance rules
- PDF quote generation
- accept/decline links
- quote and job statuses
- the compliance checklist
- QuickBooks export
- deployment
- handover documentation
- one round of interface revisions

Not included:

- scheduling

- dispatch
- invoicing
- inventory
- a native mobile app
- two-way accounting sync
- migration of historical quotes
- rebate eligibility logic

What I need from you before kickoff:

- QuickBooks access
- the cleaned price list
- the compliance rules confirmed in writing
- one person who can make decisions
- Jennifer available for about an hour twice a week

If any of those are late, the delivery date moves by the same number of business days.

What happens next

If you want to go ahead, we sign, you pay half of the remaining build price, and we agree on a start date.

If you do not, this document is yours. It is specific enough that another developer can build from it, and you are welcome to take it to one. You paid for the assessment. Hiring me for the build is a separate decision.

And if you read this and decide the right answer is to clean the price list, write the pricing rules down properly, and keep the spreadsheet for another year, that is a real outcome too.

Some assessments end there.

Sources and checks

The compliance framework above is California's Title 24 Part 6, administered since January 2026 under the Energy Code Compliance program, which replaced HERS. The rater's certificate has to be filed before a permit can final. The 2025 standards took effect on 1 January 2026 and raised stringency over the previous code, which means more installations now trigger verification than did last year.

The permit fees and local rules are jurisdiction-specific, and I have not published figures here because they vary and they go stale. In a real assessment I would list the city fee schedules, energy-code guidance, rebate program rules, and product documentation I relied on, and I would check each one against the agency that sets it before building anything against it.

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