

HVAC Automation Readiness Checklist

Find the repetitive work costing your office time, consistency and follow-up—and identify a safe first workflow to automate.

HOW TO USE IT

Mark each statement Yes, Needs work or Not sure. Do not worry about perfection. The best first automation target is usually a frequent, repeatable task with a clear owner and a human review point.

COMPANY SNAPSHOT

Company:

Completed by:

Date:

1. Lead capture & missed-call response

Every missed call or website inquiry receives a prompt acknowledgement.	☐ Yes	☐ Needs work	☐ Not sure
New leads enter one shared tracker or CRM instead of scattered inboxes and notes.	☐ Yes	☐ Needs work	☐ Not sure
Staff can see the source, contact details, requested service and next action.	☐ Yes	☐ Needs work	☐ Not sure
A new inquiry has a clear owner and an expected response time.	☐ Yes	☐ Needs work	☐ Not sure

2. Scheduling & customer reminders

Customers can request or select appointment times without repeated phone tag.	☐ Yes	☐ Needs work	☐ Not sure
Confirmations and reminders are sent consistently using approved contact channels.	☐ Yes	☐ Needs work	☐ Not sure
Reschedules, cancellations and urgent requests are routed to a person.	☐ Yes	☐ Needs work	☐ Not sure
Calendar availability reflects real service hours, lead times and capacity rules.	☐ Yes	☐ Needs work	☐ Not sure

3. Estimates, proposals & follow-up

Every open estimate or proposal has a visible status and next follow-up date.	☐ Yes	☐ Needs work	☐ Not sure
Follow-up stops automatically after a reply, acceptance, rejection or opt-out.	☐ Yes	☐ Needs work	☐ Not sure
Proposal value and signed documents are easy to find from the customer record.	☐ Yes	☐ Needs work	☐ Not sure
Staff can tell which opportunities are overdue without reviewing every email thread.	☐ Yes	☐ Needs work	☐ Not sure

4. Customer communication & service recovery

Incoming texts and emails are visible to the right staff member.	☐ Yes	☐ Needs work	☐ Not sure
Frequently asked questions have approved, consistent responses.	☐ Yes	☐ Needs work	☐ Not sure
Negative feedback or urgent language triggers a prompt human review.	☐ Yes	☐ Needs work	☐ Not sure
Do-not-contact requests and bounced addresses immediately stop automated follow-up.	☐ Yes	☐ Needs work	☐ Not sure

5. Office workflow & software integration

The team knows which system is the official source of customer and job information.	☐ Yes	☐ Needs work	☐ Not sure
Information does not need to be retyped across multiple tools for routine work.	☐ Yes	☐ Needs work	☐ Not sure
Existing phone, email, calendar, invoicing and field-service tools can export or connect.	☐ Yes	☐ Needs work	☐ Not sure
Every automation has an owner, exception path and manual fallback.	☐ Yes	☐ Needs work	☐ Not sure

6. Data, access & measurement

Staff access is limited to what each person needs for the job.	☐ Yes	☐ Needs work	☐ Not sure
Passwords and API credentials are stored securely—not in shared documents or email.	☐ Yes	☐ Needs work	☐ Not sure
Consent, opt-outs and important customer actions are recorded with dates.	☐ Yes	☐ Needs work	☐ Not sure
The business tracks a small set of useful measures, such as response time and booked jobs.	☐ Yes	☐ Needs work	☐ Not sure

Your readiness snapshot

Count your Yes answers. Use the result as a conversation starter—not a promise of outcomes or a substitute for reviewing your actual systems.

0–8 YES	9–16 YES	17–24 YES
Start with visibility Choose one shared lead tracker and one clear owner before adding automation.	Ready for a focused pilot Pick one high-volume workflow with simple rules and a human approval point.	Ready to connect systems Prioritize exceptions, access controls, reporting and gradual expansion.

BEST FIRST WORKFLOW	WHY THIS ONE?
_____	_____
_____	_____

Want a second set of eyes?

MDJ AI can map one workflow, confirm what should stay human and identify practical connections to the software you already use.

Book a 30-minute consultation

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