

HVAC CAPACITY CHECK · TEAM SHEET

Where does our week go?

Most heating and cooling businesses don't stall for lack of work. They stall because time leaks out of the week in small ways nobody records. This sheet records them for one week.

A quick, light-hearted check, not a full survey. Think of it as an introduction: a week of honest ticks to start a team conversation, not a detailed operational review. It's about the system, not about you. Every business loses time this way, and nobody is being measured.

LOST-TIME TALLY · ONE TICK EACH TIME IT HAPPENS

WHAT ATE INTO THE WORKING DAY	MON	TUE	WED	THU	FRI	TOTAL
Travel between jobs longer than planned						
Going back to finish a job a second time						
Waiting to get on site or into the property						
Collecting parts or materials						
Callbacks or fixes we didn't charge for						
Waiting for a decision or approval						
Tools, kit or systems not working (apps, devices, van stock)						
Poor communication: job details missing or wrong						

FROM WHERE I SIT · TICK IF IT'S TRUE

☐ A lot of my day goes on travel, waiting or fetching parts	U	☐ Customers often ring the owner directly rather than the office	O
☐ Jobs are often quoted before anyone has properly seen the site	Q	☐ Extra work done on site often doesn't get charged for	Q
☐ Paperwork needed to invoice a job is often late or incomplete	C	☐ I regularly go back to a job a second time to finish it	U
☐ I often wait for the owner to approve something before I can carry on	O	☐ Changes to a job are agreed verbally and never written down	C

Your ticks

Count your ticks for each letter and hand your sheet to your manager.

U /2 **Q** /2 **C** /2 **O** /2

If I could fix one thing that slows me down, it would be...

Something that already works well and we should keep...

A light-hearted introduction to where time goes, not a full operational survey. Record what actually happened this week: there are no wrong answers, and it isn't used to judge anyone's performance.


BOOK A MEETING

Choose a time for a 30-minute conversation.


WATCH OUR VIDEO

See how the GRAX Business System works.

— HVAC CAPACITY CHECK · TEAM VIEW

What is really capping our capacity?

Collect everyone's sheets at the end of the week, add up the totals below, then talk it through as a team. Keep it light: this is a starting point for a conversation, not a verdict.

LOST TIME ACROSS THE TEAM

CATEGORY	TEAM TOTAL	RANK (1 = BIGGEST)
Travel between jobs longer than planned		
Going back to finish a job a second time		
Waiting to get on site or into the property		
Collecting parts or materials		
Callbacks or fixes we didn't charge for		
Waiting for a decision or approval		
Tools, kit or systems not working (apps, devices, van stock)		
Poor communication: job details missing or wrong		

THE FOUR CONSTRAINTS · ADD UP EVERYONE'S TICKS

U
Time on the tools

TEAM TICKS

Paid hours that never become chargeable hours: travel, waiting, second visits.

Q
Quoting and pricing

TEAM TICKS

Work priced before it's understood, and extras that never get charged.

C
Cash through the job

TEAM TICKS

Late paperwork and unrecorded changes that slow the money coming in.

O
Owner dependency

TEAM TICKS

Decisions and customers that still route through one person.

ARE WE AT THE CEILING?

	YES	NO
We turn work away as a matter of routine, not the odd exception	☐	☐
Lead times have stretched without anyone deciding they should	☐	☐
Complaints are rising even though everyone is working harder	☐	☐

TALK IT THROUGH

Which lost-time category surprised us most?

What would it take to win back half of that time?

Which constraint scored highest, and why?

One thing we'll change before we hire anyone else

A quick, light-hearted team check based on How to Grow an HVAC Business at rostoneopex.com. An introduction that shows where to look first, not a full operational survey or review.



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