

## CASE STUDY · RESIDENTIAL HVAC FIELD SERVICE

# From Busy to Built for Capacity

Cypress Bay Heating & Air

A growing residential HVAC company with four service technicians and two installation crews. Phones were ringing and technicians were busy, but more demand was not turning into more usable capacity. The engagement made the workflow transferable and measurable before adding headcount — standardizing ownership, stage exits, readiness gates, exception rules, and the visibility to run the business without reconstructing status by hand.

Company names, identifying details, and selected operating data have been altered, composited, or modeled for privacy and demonstration purposes. The before/after figures are drawn from a consistent 12-month baseline and 12-month post-redesign operating dataset. They describe results within this case and are not a guarantee of future results.

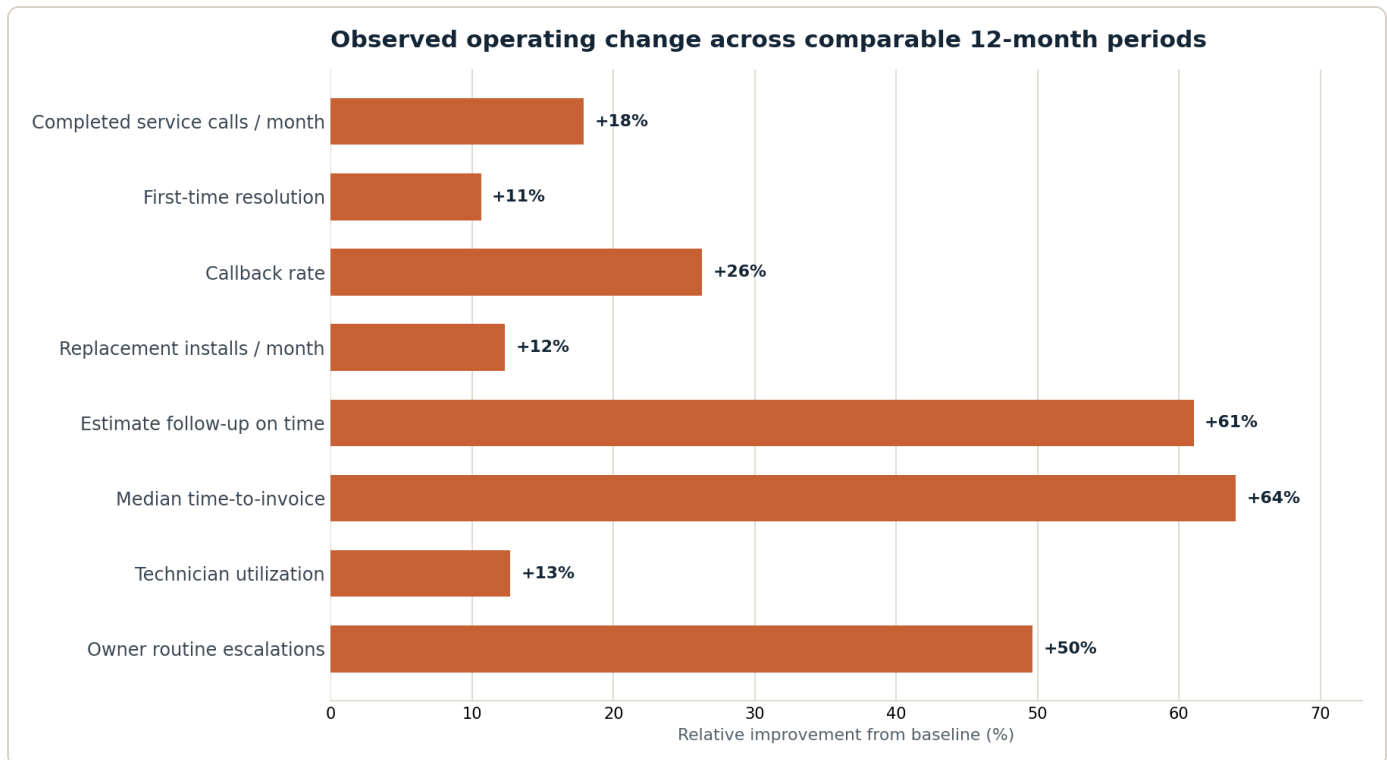
**Before · context is reconstructed at each step****After · ownership, exit conditions and exceptions are explicit**

Before and after: the same pipeline, with explicit ownership, exit conditions, and exception paths.

## Operating results

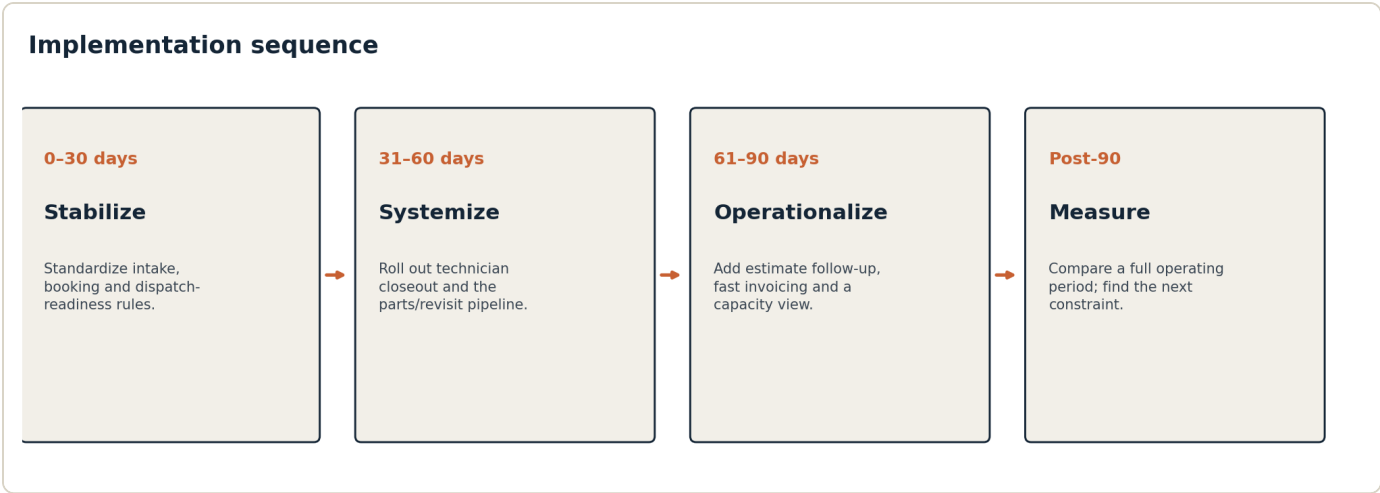
| MEASURE                         | BASELINE | POST-REDESIGN |
|---------------------------------|----------|---------------|
| Completed service calls / month | 155.9/mo | 183.8/mo      |
| First-time resolution           | 70.5%    | 78.0%         |
| Callback rate                   | 8.0%     | 5.9%          |

| MEASURE                      | BASELINE | POST-REDESIGN   |
|------------------------------|----------|-----------------|
| Replacement installs / month | 13.8/mo  | <b>15.5/mo</b>  |
| Estimate follow-up on time   | 53.9%    | <b>86.8%</b>    |
| Median time-to-invoice       | 2.5 days | <b>0.9 days</b> |
| Technician utilization       | 61.4%    | <b>69.2%</b>    |
| Owner routine escalations    | 13.7/wk  | <b>6.9/wk</b>   |



Observed operating change across comparable 12-month baseline and post-redesign periods.

# Implementation sequence



The phased roadmap: define the standards, add control points, then automate selectively.

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**Have a version of this problem?** Book a free Workflow Assessment at [bradleyhankins.com/contact](http://bradleyhankins.com/contact) — map the work before adding another tool, person, or layer of management.