

ASSESSMENT • OWNER DEPENDENCY REPORT

The owner is 61 hours a week of this company. A system can take 31 of them.

Every replacement estimate and every past-due invoice runs through the founder. Three builds would give him back 16 hours a week inside 90 days. His son is the obvious successor and has never run an estimate.

PREPARED FOR

Tolomato Air & Heat
Composite client

ENGAGEMENT

Assessment
\$2,500 • two weeks

REVIEWED AND SIGNED

Corleous Kelly
Founder, RVRBN

USE

Illustrative sample
September 2026

The company runs well. It just runs through one person.

Tolomato Air & Heat is a family-owned heating and air company with a shop in St. Augustine and a second office in St. Johns. It has 24 people and did \$3.9 million in revenue last year. The founder started it in 1991 and is 66.

61

Hours a week the founder works, from a two-week time diary

31

Of those hours a system can take over

\$94K

What those 31 hours would cost to hire at the Jacksonville rate for an operations manager

What we found

The founder personally runs every replacement estimate. Replacements are 56% of revenue, so more than half of next month's work depends on his calendar. He also takes the 6:30 a.m. dispatch call, approves every equipment order, calls every customer more than 60 days past due, and renews lapsed maintenance members by phone. None of it is written down. Most of it is repeatable work that a system can do, and some of it is judgment that only he has today.

Three findings

Sales stop when he stops. He ran all 452 estimates last year and closed 41%. Of the 267 he didn't close, 96 never got a second call. Nobody else in the company has priced a replacement.

The office waits on him. Dispatch, purchasing, collections and renewals all pause until he answers. \$236,000 is more than 60 days past due, and maintenance renewals are at 68%.

The biggest customers know only him. Fourteen commercial accounts bring in 18% of revenue, about \$700,000. Each one has his cell number and no other contact at the company.

ON THIS SAMPLE

Tolomato Air & Heat is a composite, not a real client. Its size and wages come from public data for St. Johns County and the Jacksonville area, cited on the last page. The company's own figures are illustrative and internally consistent. The format is exactly what an Assessment client receives.

The org chart has a manager for everything. The phone log has one name.

We compared the org chart with 90 days of dispatch logs, 24 months of invoices and the founder's time diary. On paper there is an office manager, a lead installer, a service manager and a bookkeeper. In practice, these decisions wait for the founder.

DECISION	ON THE ORG CHART	WHAT ACTUALLY HAPPENS
Pricing a replacement	Service manager	Founder prices all of them from memory. There is no written price book.
Changing the schedule after 7 a.m.	Dispatcher	Dispatcher texts the founder and waits. Median wait was 22 minutes.
Ordering equipment over \$500	Office manager	Founder approves by text. 31% of orders went in the day before the install.
Chasing an invoice over 60 days	Bookkeeper	Bookkeeper builds the list. Founder makes the calls on Friday afternoons.
Renewing a lapsed maintenance member	Customer service	Founder calls them himself, when he has time.
Handling a callback or complaint	Service manager	Customers ask for the founder by name, and the office puts them through.
Anything for a commercial account	Service manager	Property managers call the founder's cell.

This is how a company grows from one truck to 24 people without anyone stopping to write it down. The cost is a founder with no slack in his week and customers who wait while he is on a roof. A buyer or successor would inherit a company whose operating system lives in one head.

Every job that runs through the founder, ranked by hours.

Hours come from the founder's two-week time diary, checked against call and text logs. The last column is our estimate of how many of those hours a system can take once it is built and running.

#	JOB	HRS / WK	WHO ELSE COULD DO IT	SYSTEM CAN TAKE
01	Replacement estimates and in-home sales	16	Son, after training	4
02	Morning dispatch call and schedule changes	6	Dispatcher, with written rules	5
03	Commercial account relationships	6	Successor, over 12 months	0
04	Equipment orders and supplier approvals	5	Office manager, under a limit	3
05	Invoice review and collections calls	5	Bookkeeper	4
06	Callbacks and complaint calls	4	Service manager	1
07	Pricing decisions outside the usual	4	Service manager, with a price book	3
08	Hiring and technician interviews	3	Stays with the owner for now	0
09	Permit applications and inspection scheduling	3	Customer service	2
10	Maintenance agreement renewals	3	Nobody needs to	3
11	Monday numbers, rebuilt by hand from QuickBooks	3	Nobody needs to	3
12	Warranty registrations and rebate filings	3	Nobody needs to	3
Total		61		31

31 hours

can go to a system. They are repeatable work with clear rules that nobody wrote down.

12 hours

can go to a person. Most of it is estimating, which his son can learn by shadowing.

18 hours

stay with the founder for now. That is hiring, commercial relationships and the calls that need his judgment.

Three builds, three weeks each, 16 hours a week back.

Each one is scoped as a System Build, meaning one job working in production with a success measure agreed before work starts. They are ordered by hours returned and how fast each one pays back.

BUILD 01

4 HRS / WK

Estimate builder and follow-up

A written price book built from 24 months of invoices. It produces good, better and best options on a tablet in the driveway. Every unsold estimate gets a follow-up text or email on day 2, day 7 and day 21 without anyone having to remember.

SUCCESS MEASURE Every unsold estimate gets a second contact, up from 64% today. Write-up time drops from about 20 minutes to 5.

WHY FIRST If one in ten of the 96 estimates that never got a second call had closed, that is about \$113,000 in replacements a year. It is also the tool his son learns to estimate on.

BUILD 02

5 HRS / WK

Dispatch board and rules

One live board for both locations. It carries the rules the founder applies in his head, such as which technicians run which equipment and when a callback outranks a new call. The dispatcher can then make the change without texting him.

SUCCESS MEASURE Schedule changes made without the founder go from near zero to 90%. The 6:30 a.m. call ends.

BUILD 03

7 HRS / WK

Invoice chasing and renewals

Reminders go out automatically at 15, 30 and 45 days past due, and the bookkeeper only calls the accounts that don't respond. Maintenance members get renewal notices 30 days before they lapse, with a link to pay.

SUCCESS MEASURE Over-60 receivables fall from \$236,000 to under \$120,000 in 90 days. Renewals rise from 68%.

The other 15 hours a system can take (ordering limits, the Monday numbers, permits, warranty filings, pricing rules and callback triage) come after these three. They are smaller and they depend on the price book and dispatch board being in place first.

Some of this should stay with a person.

Not every hour should be automated. These are the calls that need his judgment and his relationships today. The goal is to hand them to a person over time, not to a system.

STAYS WITH THE FOUNDER	WHY, AND WHO IT GOES TO NEXT
Commercial account relationships	Fourteen property managers trust him personally. Each one needs a second contact at the company before any change of ownership. His son should be the first.
Hiring	He has a good eye for technicians and a 3-year average tenure to show for it. His son should sit in on every interview from now on.
Pricing strategy	The price book handles routine pricing. Deciding when to raise prices, or when to match a competitor, stays with him.
Safety-related callbacks	Anything involving gas, carbon monoxide or a failed inspection goes to him or a licensed manager. That rule should be written down, not assumed.

If the founder were gone for 30 days.

Replacement sales would stop within three weeks, once the current backlog ran out. That is 56% of revenue with no second estimator.

Commercial accounts would have nobody to call. That is 18% of revenue relying on one cell phone.

Pricing would be guesswork, because the price book doesn't exist yet.

The company would still install and service equipment well. The technicians and the customer base are real assets. The gap is in the office, not the field.

Buyers of heating and air businesses pay less when the owner does all the selling and holds the key relationships, and they pay more for recurring maintenance revenue and a team that runs without the owner. Every step on the next page moves the company in that direction. RVRBN doesn't appraise businesses or broker sales.

What we would do first, in order.

WHEN	WHAT	DONE MEANS
Weeks 1 to 3	Build 01, the estimate builder and follow-up	Price book in use on every estimate, and follow-ups going out on their own
Weeks 2 to 6	His son shadows 10 estimates, then runs 10 with the founder watching	Son runs estimates alone on standard replacements
Weeks 4 to 6	Build 02, the dispatch board and rules	Dispatcher changes the schedule without calling the founder
Weeks 7 to 9	Build 03, invoice chasing and renewals	Reminders and renewal notices going out automatically
Weeks 8 to 12	Founder introduces his son to all 14 commercial accounts, in person	Every commercial account has a second name to call
Day 90	Re-run the time diary for two weeks	The founder's week is 45 hours or less, measured the same way as today

THREE BUILDS	HOURS RETURNED	OPTIONAL NEXT STEP
\$13,500	16 / wk	Succession readiness
\$4,500 each, fixed fee	About 800 hours a year	Monthly, once the builds are running

I reviewed every finding in this report against the source records and the founder's own account.
Where a number is an estimate, I have said so.

Corleous Kelly

FOUNDER, RVRBN • REVIEWED AND SIGNED

How this composite was built.

Tolomato Air & Heat does not exist. Its size, wages and market come from the public data below, so the company is typical of St. Johns County without describing any real business. Its internal figures, like hours and close rates, are illustrative. A real Assessment takes those from the client's own records.

How a real Assessment runs

Four days on site across every location. Interviews with most of the staff. Ninety days of dispatch and call logs, 24 months of invoices, and a two-week time diary kept by the owner. The report arrives at the end of week two.

Public data behind the composite

Local market	St. Johns County has 100 plumbing and heating and air contractor establishments with 950 employees and \$51.1 million in annual payroll, about \$53,700 per employee. Two-thirds have fewer than five employees, and 11 have between 20 and 99.	U.S. Census Bureau, County Business Patterns 2023, NAICS 238220
Licensed contractors	125 certified air conditioning contractors (CAC license) list a St. Johns County address.	Florida DBPR, Construction Industry Licensing Board extract, September 2026
Wages	Jacksonville metro means: HVAC mechanics and installers \$58,820, dispatchers \$52,000, bookkeeping clerks \$54,620, general and operations managers \$126,740 (\$60.93 an hour).	BLS Occupational Employment and Wage Statistics, May 2025, Jacksonville MSA
Owner age	51% of U.S. employer business owners were 55 or older.	U.S. Census Bureau, Annual Business Survey 2019 (2018 data)
Owner dependence	Heating and air businesses where the owner does all the selling sell for less than those with recurring service revenue and a management team.	ShareWillow, HVAC valuation guide, 2025 (industry vendor)