

HVAC operations playbook and SOPs

Version 1.0 | October 26, 2026

Operating model

Use this playbook to coordinate residential and light commercial HVAC work from first inquiry through service, installation, maintenance and follow-up. Every handoff has an owner, an acceptance rule and a recorded next action.

Scope

This is the operating model for the GCom Pro fictional HVAC demonstration. It includes twelve SOPs, six reusable record templates, dashboard definitions and a rollout plan. The sample data is a fixed scenario dated October 26, 2026. It is not a live dispatch system and does not connect to customer accounts, send messages, schedule technicians or create invoices.

Adoption

Before operational use, the business owner and qualified HVAC technical lead must adapt the procedures to the service territory, equipment, contracts, insurer requirements and applicable rules. Define business hours, on-call coverage, financial approval limits and customer promises. Record the approved version and train each role before launch.

Technical boundary

These procedures govern coordination and evidence. Equipment diagnosis, refrigerant work, electrical isolation, combustion checks and commissioning require appropriately qualified personnel following current manufacturer instructions and applicable requirements. This manual is not a repair guide or permission to energize or operate equipment.

Ownership

The sending role owns a handoff until the receiving role accepts it. Accepted means the recipient has the scope, required records, known exceptions and next action. An unanswered message is not acceptance. Assign a backup when the primary owner is unavailable.

Completion

Close a coordination task only when its acceptance evidence is recorded. A completed checklist does not by itself establish a safe installation, a paid invoice, a passed inspection or a resolved customer concern. Retain separate evidence for each outcome.

Roles and daily control

One person may hold multiple roles in a small business, but approval and review responsibilities must remain clear.

Service coordinator

Owns inquiry capture, contact preferences, access details and appointment communication. Checks the intake record, identifies urgent concerns and gives the dispatcher a complete service request. Does not diagnose equipment over the phone.

Dispatcher

Owns the service queue, skills match, travel and appointment windows. Confirms technician acceptance and flags capacity exceptions. Avoids promising an arrival time before capacity is confirmed.

Technical lead and technician

The technical lead owns competence checks, technical escalation, safety controls and release criteria. The assigned qualified technician records findings, approved scope, work evidence and remaining restrictions. Either can stop work when conditions or evidence are inadequate.

Installation and parts leads

The installation lead owns readiness and commissioning handoff. The parts lead verifies exact equipment compatibility, order approval, receipt and return records. A substitute requires technical acceptance before use.

Finance and customer care

Finance reconciles approved scope, labor, materials, invoice and payment status. Customer care owns callback intake, warranty documentation and maintenance reminders. The service manager resolves priority conflicts and reviews repeated failures.

Cadence

At opening, review urgent concerns, overnight requests, today's appointments, parts holds and unaccepted handoffs. Midday, reconcile schedule changes and promised callbacks. At close, assign owners for unfinished jobs, confirm customer updates and hand off after-hours coverage. Weekly, review aged work, callbacks, maintenance commitments and matched costs. Monthly, review capacity assumptions, training, supplier performance and procedure changes.

Service promises and escalation

Use priorities to route the next decision. Response targets below are proposed operating defaults for adoption, not configured timers or customer guarantees.

Immediate hazard concern

Reports of fire, gas odor, a carbon monoxide alarm, electrical arcing or immediate danger require the approved emergency script and local emergency or utility response. Do not ask the caller to inspect, reset or test equipment. Record only necessary facts and alert the duty manager. A routine service appointment is not the emergency response.

Urgent comfort or business interruption

No heating or cooling with vulnerable occupants, extreme conditions or a critical commercial dependency goes to the duty manager for priority and capacity review. Proposed internal acknowledgment target: 15 minutes during staffed hours. The manager confirms an achievable next step; the target is not an arrival guarantee.

Routine service

A nonhazardous equipment concern goes into the normal scheduling queue. Proposed internal target: acknowledge within two business hours and offer the next available suitable window. Record access needs, exclusions and the callback promise.

Planned work

Maintenance, estimates and installations follow confirmed scope and readiness. Proposed internal target: contact the requester within one business day. Track promised quote or planning dates separately from appointment dates.

Missed commitment

The owner alerts the manager before a promise will be missed, records the cause and obtains a revised plan. Contact the customer using approved preferences and record the accepted next step. Repeated misses become a corrective-action item.

After-hours handoff

The departing dispatcher gives the on-call owner the request reference, stated concern, completed actions, customer promise and unresolved dependency. The on-call owner explicitly accepts. If no qualified coverage exists, use the approved escalation script and avoid implying that service has been dispatched.

SOP 01 Inquiry intake and triage

Owner: service coordinator. Trigger: a new call, form submission, referral or returning customer request.

Output: an accepted service request with a documented priority.

1 Capture the request

Create one request reference and check for an existing open request for the same concern. Record customer contact preference, service address in the private operating system, equipment type if known, symptoms in the customer's words, access constraints and preferred window. Do not collect payment card details in notes.

2 Apply the urgency script

Ask the approved screening questions without diagnosing or directing technical work. Route immediate hazard concerns through the emergency protocol. Escalate vulnerable-occupant or critical-business circumstances to the duty manager for review.

3 Explain the next step

Describe the service area, availability process, diagnostic fee if applicable and what requires a separate estimate. Record the customer's understanding. Do not promise a repair result, warranty coverage or same-day arrival without confirmation.

4 Hand off to dispatch

Give the dispatcher the request reference, priority rationale, stated symptoms, access information, contact permission and next action. The dispatcher accepts or returns the record with missing fields identified.

Acceptance and exception

Intake is complete when dispatch accepts a usable request and the customer has a clear next step. Missing access or contact details remain an owned exception. Keep the underlying service request open until its own closure criteria are met.

Required record

Request reference; received time; channel; stated concern; priority and rationale; contact preference; access restrictions; fee disclosure; receiving owner; next action and promised follow-up.

SOP 02 Dispatch and schedule control

Owner: dispatcher. Trigger: an accepted service request or a change to the day's schedule. Output: a technician-accepted assignment and a confirmed customer window.

1 Match the work

Check equipment category, required qualifications, known site constraints, estimated duration and any parts dependency. Match the work to a qualified available technician; request technical-lead review when the requirement is uncertain.

2 Confirm the window

Consider existing appointments, travel, breaks and contingency time. Confirm a realistic arrival window with the customer and record access arrangements. An open calendar slot alone is not proof of readiness.

3 Transfer the job packet

Provide the technician with the accepted request, approved scope, service history, access details, customer promise and known limitations. Obtain acceptance and record the assigned owner and backup.

4 Manage changes

Record arrival, delay, parts hold or reassignment events in the operating system. Reconfirm a changed window with the customer. Preserve the reason and prior commitment instead of silently overwriting it.

Acceptance and exception

Dispatch is accepted when the technician confirms the job packet and the customer window is recorded. Missing qualification, access or critical parts produces a hold or manager decision. Only the manager can reprioritize a critical conflict.

Required record

Request reference; assigned technician and qualification check; scheduled window; duration assumption; access confirmation; technician acceptance; customer update; delay reason; next review time.

SOP 03 Site arrival and technical review

Owner: qualified technician, with technical-lead escalation. Trigger: arrival at the assigned site. Output: documented findings and an approved next step.

1 Confirm scope and access

Identify the equipment against the job packet and confirm the reported concern with the customer. Record model and serial references, relevant history and access limitations in the private service record.

2 Apply site controls

Assess conditions using the employer's approved safety and equipment-specific procedures. Use required energy-control, PPE and work-area controls. Stop and escalate if the technician cannot establish the required conditions or competence.

3 Record findings

A qualified technician performs appropriate assessment under manufacturer procedures. Record observed conditions and relevant measurements with units, method and reference limits. Separate observed evidence from a suspected cause.

4 Present the decision

Explain the findings, repair options, limitations and estimate requirement in plain language. Obtain approval for the next scope before chargeable work beyond the original authorization. Escalate unclear or disputed findings to the technical lead.

Acceptance and exception

The review is complete when findings, limitations and the authorized next step are recorded. If the equipment cannot be released for normal use, the technical lead determines restrictions and communicates them through the approved process. A dashboard status does not provide technical clearance.

Required record

Equipment reference; complaint; observations; measurements and units; applicable instructions; technical reviewer when needed; options; authorization; restrictions; next owner and action.

SOP 04 Estimate and scope authorization

Owner: service manager or authorized estimator. Trigger: repair, replacement or change work needing approval. Output: an accepted scope and price record.

1 Establish the baseline

Reference the technical findings and define included work, exclusions, equipment, labor, permits where applicable and disposal responsibilities. Separate a diagnostic fee from the repair or installation estimate.

2 Confirm commercial assumptions

Verify parts availability, lead times, taxes, approved payment terms and warranty statements. State expiration, scheduling dependencies and what will trigger a change review. Do not invent financing eligibility or rebate approval.

3 Review authority

Apply the business's documented price and discount limits. Route exceptions to the authorized approver. Record customer authorization through the approved agreement workflow before releasing work.

4 Control changes

If conditions change, pause the affected scope, explain the difference and document the revised price and schedule. Obtain the required approval before proceeding. Retain the original version and change rationale.

Acceptance and exception

The estimate is accepted only when the scope version, price, customer approval and internal exception approvals are recorded. An unanswered estimate, verbal assumption or dashboard budget is not authorization.

Required record

Estimate reference and version; findings reference; included and excluded scope; price basis; lead-time assumptions; terms; customer decision; internal approvals; change history.

SOP 05 Parts and refrigerant records

Owner: parts lead, with technical-lead review. Trigger: a material requirement, unavailable part or inventory discrepancy. Output: verified materials and traceable custody records.

1 Identify the requirement

Match the required part to the equipment and approved scope. Record manufacturer specification, quantity and needed-by date. The technical lead approves any substitute before ordering or use.

2 Confirm purchase authority

Check available stock, supplier acknowledgment, price and internal purchase limits. Separate requested, ordered, acknowledged, received and issued quantities. Do not mark goods received from an estimated delivery date.

3 Receive and issue

Inspect received items for identity and visible damage, reconcile quantities and assign them to the job or inventory location. Record returns, warranty cores and discrepancies with their owners.

4 Maintain refrigerant controls

Before applicable refrigerant work, verify the technician's required EPA Section 608 certification type and the employer's equipment and handling requirements. The qualified lead maintains applicable refrigerant, recovery and disposition records. This playbook does not prescribe refrigerant handling techniques or substitute for current requirements. See source 1.

Acceptance and exception

Materials are ready when correct identity, quantity, condition and job allocation are confirmed. A missing, damaged or unapproved substitute creates a parts hold with a supplier action and next review. Unknown receipt or refrigerant evidence remains unknown.

Required record

Job and equipment reference; specification; quantity; approval; supplier acknowledgment; receipt and issue record; discrepancy; return reference; applicable refrigerant record; owner and next action.

SOP 06 Repair execution and release

Owner: qualified technician. Trigger: authorized repair scope and confirmed readiness. Output: documented repair, technical release decision and customer handoff.

1 Recheck readiness

Confirm the approved scope, correct materials, required qualifications and applicable manufacturer procedure. Apply the employer's energy-control and site safety process. A schedule assignment is not a safety clearance. See source 2.

2 Perform approved work

Carry out only authorized work within competence and applicable instructions. Record labor, parts, observed conditions and deviations. Stop the affected work when a new condition changes the scope or required controls.

3 Verify the result

Complete the required equipment-specific verification and document the results, units and acceptance criteria. Have the technical lead review exceptions. Do not infer successful repair from the absence of an error message or a completed task row.

4 Explain the outcome

Describe work performed, operating instructions, remaining limitations, warranty information and the next maintenance step. Record customer receipt and any unresolved concern. Customer acknowledgment confirms the handoff, not technical competence or waiver of rights.

Acceptance and exception

Release requires the applicable technical acceptance evidence and documented remaining restrictions. If criteria are not met, retain a hold, name the technical decision owner and provide an agreed next action. Open billing or customer-care tasks remain separate.

Required record

Authorized scope; work record; materials and labor; test results and criteria; reviewer decision; restrictions; customer handoff; remaining work; next owner and date.

SOP 07 Preventive maintenance

Owner: maintenance coordinator and assigned qualified technician. Trigger: a contracted or requested maintenance visit. Output: an evidenced maintenance record and a scheduled next review.

1 Build the due list

Use equipment identity, manufacturer guidance, service agreement and operating conditions to establish the maintenance plan. Confirm the covered assets and exclusions. ENERGY STAR recommends contractor pre-season checkups; the actual plan must fit the equipment and agreement. See source 3.

2 Confirm the visit

Check customer availability, access, required materials and technician competence. Send approved confirmation only through the authorized business process. Record reschedules and the reason rather than counting them as completed visits.

3 Complete the applicable checklist

Use the approved equipment-specific checklist. It may cover filters, airflow, drains, controls and heating or cooling components as applicable. The qualified technician documents measured results and exceptions; do not check a box for work that could not be performed.

4 Route findings

Distinguish included maintenance from recommended repair or replacement. Provide documented findings and obtain separate authorization for additional scope. Escalate conditions that prevent normal release through the technical lead.

Acceptance and exception

A maintenance visit is complete when required activities, exceptions and customer handoff are recorded. Inaccessible equipment or missing required checks remain open exceptions. The next due date must follow the approved plan; a reminder alone is not a completed service.

Required record

Asset list; agreement reference; checklist version; visit date; completed checks; measurements; exclusions; recommendations; customer handoff; next due date and owner.

SOP 08 Installation readiness and commissioning

Owner: installation lead and qualified technical reviewer. Trigger: an approved replacement or new-installation project. Output: an accepted installation package and documented commissioning decision.

1 Confirm design and scope

Verify the approved equipment selection, sizing and design references, site conditions, customer requirements and included work. The qualified professional owns design decisions; do not size equipment from a prior unit or dashboard task budget alone.

2 Clear readiness dependencies

Confirm applicable permit and inspection requirements with the responsible authority, material identity, access, qualified crew and required tools. Record evidence and unresolved conditions in the readiness record. Hold affected work when critical prerequisites are missing.

3 Control installation

Follow the approved design, manufacturer instructions and applicable requirements. Document equipment identifiers, materials, approved changes and installation evidence. The lead reviews deviations before they are concealed or handed over.

4 Commission and hand over

Complete the required equipment-specific commissioning and verification records. Where relevant, retain airflow, controls and refrigerant-related results with qualified review. Provide operating instructions, maintenance requirements, warranty documents and applicable inspection results. ENERGY STAR's commissioning checklist is a reference for covered program installations, not a universal substitute for the job requirements. See source 4.

Acceptance and exception

Close installation coordination only after the technical release decision, required inspections and customer handoff evidence are complete or unresolved items are explicitly retained in an owned punch list. A punch list must not conceal a condition that prevents use.

Required record

Approved design and scope; equipment serials; permit and inspection references; readiness checklist; deviations; commissioning results; reviewer; customer handoff; punch list; warranty registration responsibility.

SOP 09 Callback and warranty resolution

Owner: customer care, with service-manager and technical-lead review. Trigger: a repeated concern, callback or warranty request. Output: a linked resolution record and an owned corrective action when needed.

1 Link the history

Create a new callback record linked to the original job and equipment. Preserve the closed job history. Capture the customer's current concern and repeat the urgency screening; do not assume a previous diagnosis still applies.

2 Confirm responsibility

Review original scope, findings, parts, warranty terms and elapsed time. Separate a potential workmanship issue, part failure, unrelated condition and an unresolved question. Do not promise coverage before verification.

3 Assign the review

Give the technical lead the original and current evidence. Assign a qualified technician, customer contact owner and next promised update. Record who approves any no-charge or goodwill work.

4 Resolve and learn

Document the verified cause, authorized action, result and customer handoff. If a process failure contributed, create a corrective-action task with an owner and due date. Review similar incidents without attributing fault before evidence is available.

Acceptance and exception

Close the callback only when technical review, coverage decision, customer communication and remaining actions are recorded. A refund or invoice credit does not by itself demonstrate technical resolution. Keep disputed or unverified cases open.

Required record

Callback reference; linked job; stated concern; urgency; review evidence; coverage decision; approval; corrective action; resolution evidence; customer update; closure reviewer.

SOP 10 Invoice and job cost closeout

Owner: finance reviewer. Trigger: an accepted service or installation handoff. Output: reconciled billing and cost records with unresolved exceptions assigned.

1 Reconcile the job

Compare authorized scope and changes with actual labor, materials, subcontractor records and applicable tax treatment. Identify missing time or supplier evidence. Do not turn an unknown amount into zero.

2 Prepare the invoice

Use the approved billing system and customer terms. Confirm bill-to details, deposits, credits and covered warranty items. Route price disputes or unapproved scope to the manager before release.

3 Record payment separately

Track invoice status and payment evidence independently from technical completion. Use the approved processor; never store full payment-card data in notes. Reconcile receipts before marking paid.

4 Review job costs

Compare budget and spend only where both are known and relate to the same scope. The demo's task budgets are operating allocations, not sales, profit or an estimate to complete. Job margin needs verified revenue and a defined cost basis in a separate record.

Acceptance and exception

Finance closeout requires reconciled scope and known billing/cost evidence, with disputes and receivables retained under named owners. A Done task does not mean cash was collected. Preserve missing cost evidence as an exception.

Required record

Job and estimate reference; approved changes; labor and material evidence; invoice reference; deposits or credits; payment status; budget/spend coverage; variance explanation; reviewer and next action.

SOP 11 Maintenance agreements and follow-up

Owner: customer care or maintenance coordinator. Trigger: completed work, an upcoming covered visit or agreement renewal. Output: an accurate commitment record and an authorized next contact.

1 Verify the agreement

Confirm covered equipment, visit frequency, exclusions, start and end dates, cancellation terms and approved pricing. Do not represent proposed benefits or response priority as active coverage.

2 Plan the next commitment

Create the next visit or renewal action with an owner and date. Reconcile capacity before offering a window. Keep a declined offer, an unanswered reminder and an accepted appointment distinct.

3 Use contact preferences

Use the approved communication system and the customer's recorded preferences. Review required consent and opt-out rules for the actual channel. This demo does not send automated reminders or enroll anyone in a campaign.

4 Close the loop

Record the response, scheduled next step, cancellation or unresolved question. Route dissatisfaction to callback or complaint review. Provide a clear contact path for future issues.

Acceptance and exception

Follow-up is complete when the contact outcome and next obligation are recorded. Renewal requires an accepted agreement under the business's approved process; an open opportunity is not recurring revenue. Assign missed commitments for review.

Required record

Agreement reference; covered assets; terms version; next due date; contact preference; approved message; response; accepted commitment; cancellation or opt-out; owner and next action.

SOP 12 Executive review and corrective action

Owner: service manager. Trigger: the daily review, weekly operating meeting or a material exception.

Output: a prioritized decision log with verified follow-through.

1 Check the evidence

Confirm the dataset date and source before interpreting the dashboard. Review open work, Stuck tasks, overdue dates and missing next actions. For HVAC, the current source is a fixed fictional scenario, not a refreshed Monday board.

2 Review operating commitments

Compare the separate service schedule, parts holds, callback queue, maintenance commitments and installation readiness records. Do not infer technician availability or completed visits from task counts.

3 Decide and assign

Choose the next action based on customer impact, safety escalation, dependencies and available qualified capacity. Record the decision, accountable owner, due date, evidence needed and review point. Retain unresolved assumptions.

4 Verify closure

At the next review, inspect the agreed evidence and receiving-role acceptance. Close the corrective action only when the stated criterion is met. If the result is insufficient, return it with a specific next action rather than rewriting the original decision.

Acceptance and exception

The meeting is complete when each material exception has a decision or an explicit deferred decision with an owner and date. Procedure, pricing, staffing or automation changes require the responsible business approval before implementation.

Required record

Review date; source and coverage; issue; customer or operating impact; decision and rationale; owner; due date; required evidence; review result; document or training change.

Dashboard metric dictionary

The HVAC tab uses the same task calculations as the other operations industries. The sample contains 24 fictional coordination tasks. It does not calculate equipment performance or live service outcomes.

Work and completion

Open work is total DEMO tasks minus tasks whose status is Done. Completion is Done tasks divided by total tasks, rounded to a whole percent. Stuck is the blocked category; other non-Done tasks appear active. These are coordination-task measures, not completed jobs or physical installation progress.

Needs attention

Count each open task once if it is Stuck, overdue, or missing status, due date or next action. Overdue means a due date earlier than today's date in America/New_York. Closed tasks are excluded. Missing budget or spend appears in data completeness but does not independently trigger the attention count.

Reported budget and spend

Each total sums its known values and separately discloses missing rows. Budget utilization and remaining budget use only tasks with both values present. Utilization is matched spend divided by matched budget; a nonpositive matched budget has no meaningful ratio. Remaining budget is matched budget minus matched spend and can be negative.

Workstream and upcoming work

Workstream completion is Done divided by all tasks in that workstream. The upcoming chart counts open tasks with due dates in six calendar-week buckets beginning on Monday; tasks without dates are excluded. Open-task budget is an allocation total, not a cost-to-complete estimate or sales forecast.

Completeness and fixed date

Completeness counts known status, workstream, next action, due date, budget and spend across all tasks. Null means unknown; zero can be a valid known amount. HVAC displays its fixed scenario date and makes no live-refresh claim. Relative overdue and upcoming buckets still change as the calendar advances.

Proposed future service measures

First-time resolution requires a defined callback window and linked completed visits. On-time arrival requires promised windows and arrival timestamps. Maintenance completion requires due and completed eligible visits. Technician utilization requires productive hours and available hours under a defined policy. Job margin requires recognized revenue and a defined cost basis. None of these is measured by this task-only HVAC tab.

Working templates for intake and delivery

Use these field lists to create records in the business's approved private operating system. The public demonstration must contain fictional identifiers only.

Template 1 Service request

Request ID: ____ | Received at: ____ | Channel: ____ | Customer contact preference: ____ | Site and access reference: ____ | Equipment reference: ____ | Concern in customer's words: ____ | Urgency and rationale: ____ | Fee disclosure: ____ | Dispatch acceptance: ____ | Next owner action and date: ____

Template 2 Dispatch handoff

Job ID: ____ | Scope version: ____ | Priority: ____ | Qualified technician: ____ | Required skills checked by: ____ | Planned window: ____ | Parts and access ready: ____ | Known restrictions: ____ | Technician acceptance: ____ | Customer confirmation: ____ | Delay or escalation owner: ____

Template 3 Technical and completion record

Job and equipment ID: ____ | Approved scope: ____ | Applicable procedure version: ____ | Observations: ____ | Measurements units and criteria: ____ | Work performed: ____ | Parts and labor: ____ | Verification result: ____ | Technical release or hold: ____ | Reviewer: ____ | Customer handoff: ____ | Open actions: ____

Use and storage

Keep original evidence references with each record. Use access controls appropriate to customer and employee information. The business owner sets retention and deletion rules after reviewing applicable obligations. Do not publish addresses, customer names, contact details, access codes or private equipment records in the demo.

Working templates for control and review

These records keep approvals, callbacks and costs separate from task status.

Template 4 Estimate and change record

Job ID: ____ | Original scope and version: ____ | Proposed change: ____ | Reason and evidence: ____ |
Included and excluded work: ____ | Price and schedule effect: ____ | Unknowns: ____ | Customer
authorization: ____ | Internal approver: ____ | Approved version and date: ____

Template 5 Callback and corrective action

Callback ID: ____ | Original job: ____ | Current concern: ____ | Priority screening: ____ | Evidence
reviewed: ____ | Verified cause or unknown: ____ | Coverage decision: ____ | Approved action: ____ |
Customer promise: ____ | Corrective-action owner and due date: ____ | Closure evidence and reviewer:

Template 6 Cost and management review

Task or job ID: ____ | Scope and cost period: ____ | Known budget: ____ | Known spend: ____ | Matched
pair: ____ | Missing evidence: ____ | Remaining matched budget: ____ | Invoice and payment references:
____ | Separate forecast assumptions if any: ____ | Decision: ____ | Owner action and review date: ____

Worked cost example

A fictional installation-readiness task has a \$12,000 allocation and \$7,500 recorded spend. A maintenance-planning task has a \$3,000 allocation and unknown spend. Report \$15,000 known budget and \$7,500 known spend, with one missing-spend row. The matched pair gives 62.5% utilization before display rounding and \$4,500 remaining. Do not treat the second task as having zero spend.

Worked handoff example

A technician has supplied a service report, but the required technical review is missing. Keep release review open, identify the reviewer and schedule the next action. Do not mark the equipment accepted because the report was uploaded. A separate documentation task can close only if its own acceptance criterion is met.

Rollout and maintenance

Adopt the operating model in stages and verify that the records support the intended decisions before enabling integrations.

Week 1 Confirm the model

Assign a business owner and qualified technical lead. Approve service territory, scope, emergency scripts, qualification requirements, hours, financial authority and required records. Walk through a routine service request, parts hold, installation and callback using fictional cases.

Week 2 Test handoffs

Run a limited internal pilot. Verify that the sender and receiver agree on acceptance, that missing evidence remains visible and that customer promises are achievable. Review exceptions daily and revise the procedures before broad use.

Week 3 Validate measures

Map private operating records to the dashboard's definitions. Reconcile source counts, budgets, spend and task status. Define any proposed service KPI and its denominator before displaying it. Retain a fixed test dataset for regression checks.

Week 4 Release controlled changes

Train the relevant roles, record the approved version and publish the adopted process. Enable reminders, dispatch connections or financial integrations only under a separately approved scope with permissions, logging, failure handling and a tested rollback.

Ongoing ownership

Review exceptions weekly and the document monthly during adoption, then at the business's approved cadence. Reassess after a regulatory, equipment, staffing, system or service change. Keep version, owner, approver, effective date and change summary. Retire superseded copies without erasing operational history.

Current demo status

The HVAC scenario is a fixed fictional dataset. The existing seven-board Monday publisher is unchanged. No new board, recurring refresh, customer messaging, dispatch connection or accounting integration is configured by this manual.

References and document control

Primary references were checked on October 26, 2026. The qualified lead must verify the current rules and equipment instructions when adapting this operating model.

Source 1 EPA technician certification

US Environmental Protection Agency, Section 608 Technician Certification. Certification requirements depend on the work and equipment category. [Read the source](#)

Source 2 OSHA hazardous energy

Occupational Safety and Health Administration, 29 CFR 1910.147, The control of hazardous energy. The employer's qualified safety lead determines applicable controls and procedures for the actual work. [Read the source](#)

Source 3 ENERGY STAR maintenance

ENERGY STAR, Maintenance Checklist. Contractor pre-season maintenance and equipment checks provide general planning context; use the actual manufacturer checklist and service agreement. [Read the source](#)

Source 4 ENERGY STAR commissioning

ENERGY STAR, National HVAC Commissioning Checklist, Version 3 and 3.1, Revision 11. This is a program-specific reference, not a universal commissioning standard for every installation. [Read the source](#)

Document owner

GCom Pro demonstration content. Version 1.0, October 26, 2026. Adoption owner: the implementing business's service manager. Technical approval: the implementing business's qualified HVAC lead. Actual operational approval and effective date must be recorded before use.

Change record

Version 1.0 adds the HVAC operating model, twelve SOPs, six templates, task metric definitions and a staged rollout. All sample identifiers and operating allocations are fictional.