

A TO Z
BOOK
ON
COMMERCIAL
HVAC SERVICE

STAFF JOB TRAINING TRACKS

Mastering a Thriving
Commercial **HVAC** Business

WENDELL BEDELL

Commercial HVAC Service Job Training Tracks

©October 14, 2022, Wendell Bedell

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Introduction

Training and development help HVAC SERVICE companies gain and retain top talent, increase job satisfaction and morale, improve productivity, and earn more profit. Additionally, HVAC businesses that have actively interested and dedicated employees see ABOUT a 41 percent lower absenteeism rates and 17 percent higher productivity. This webinar provides immediate solutions to ACHIEVE THESE ENDS.

In these courses, we present WHAT Commercial HVAC service contractors should provide their staff for job training on today's best practice work delivery processes and forms.

As a result of actual client Commercial and commercial HVAC service contractor growth, we see up to a 65%+ increase in revenues, profits, and contractor sustainability.

"This program has helped me keep things simple and make them, so I do not have to learn the hard way. I finally am now making a fair profit. This book provides the tools necessary to implement a winning strategy."

Chris Fisher
Fisher Mechanical

"This program has certainly helped bring my business to the next level. I highly recommend this book for any commercial HVAC business looking to expand their bottom line and organize their company."

Jonathan Burbank
Custom Climate

Successful contractors know it is all about managing people to processes that enable success. Processes that help capture your fair share of revenue and profit opportunities. We provide franchise-like business and work delivery processes that you can train your staff to replicate every time.

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Need Help Expediting Change



Today's HVAC business owners and Manager Job Training Tracks may know how to make repairs, upgrades, and system replacements, but most do not know how to properly develop their business and people. They are usually too bogged down in the daily business tasking to get it all done even when they know. We encourage you to tap into our experience and expertise as HVAC business Manager Job Training Tracks for many successful Commercial HVAC companies.

We can help you expedite the implementation of this masterclass set of best practices, so you can:

- Turn underperforming business offerings into super-successful fast.
- Attract and retain top people by developing your own internal business coaching program.
- Coach your service team to become Proactive through best practices.
- Empower your people to solve their problems and become fully accountable for their success.
- Handle difficult people and determine when to let them go without collateral damage.

Our Help can mean the Fastest Means to Success

We know what dealers need in their businesses to be successful. Every year, you need tools and strategies to increase lead conversion rates and decrease the time dedicated to serving customers in a more challenging market every year. We can offer you a way to do both.

The primary purpose of a change management action plan is to drive future revenue and operating performance. These action plans create a roadmap for you and your staff to reach your goals. Our company can design special-purpose training workout sessions to solve the needs of our Commercial HVAC contractor's profit improvement initiatives.

Since each contracting company is unique in its people, business mix, and goals, we stand ready to help guide you through all of the program benefits and help expedite implementation of our proven processes.

It is your future. Take charge. Take your HVAC business to the next level. To get started, enroll in to the HVACPo Masterclass Business Growth Club. Join us today and outperform the competition within days of enrollment.

General Manager/Operation Manager Job Training Track

NOTE: To order documents, go to www.joinhvacsucces.com

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-one:

- a. Light-Commercial Upfront Repair Pricing Method.
- b. Time & Material Repair Pricing Method.
- c. **Subscription provided or purchase these documents:**

Product ID	Done-Right Flat-Rate Price Guide	
1001	<p>You can order the Done-Right HVAC or Plumbing or as an Electrical repair guide. Select one repair guide for only \$39.95 per month, select two repair guides for only \$69.95 per month, or select all three guides for only \$79.95 per month, a 12-month subscription. <i>Includes upload data for QuickBooks™ or for your field management software.</i></p> <p>Subscription consists of the following online training and resources:</p> <ul style="list-style-type: none">• Technician Fix-Right Flat Rate USER Instructions.• Professional service call handling process.• Technician Service Call Handling Soft Skills for Proper Customer Communications.	<i>\$39.95/M onth To \$79.95/M onth</i>

Product ID 1002	Technician/Installer Onsite Hourly Truck and Travel Costs & Pricing Calculator Program in MS Excel This document is used by service and replacement management to calculate the upfront per trip truck and travel rate for your upfront repair and replacement price guides. This document is provided in MS Excel format with results printed on your local printer.	\$69.95
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2. 1-hour part-two:

- a. Commercial HVAC Service Agreement Pricing Method.
- b. Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.
- c. Locking in Projected Repair Revenue Pricing Strategy Review.

d. Subscription provided or purchase these documents:

Product ID 1003	EasyPrice Service Agreement Sales Call Opportunity Assessment Form Mechanical rooms or central plant areas are logical starting points for multi-facility or multi-story facilities. Starting at the mechanical room or central plant gives the salesperson a better picture of how the conditioned air or water is distributed throughout the facility(s). Understanding how the HVAC/R system is distributed enables the salesperson to look for and ask pertinent questions related to system operating and maintenance tasking requirements.	\$99.95
1004	EasyPrice Service Agreement Estimating & Pricing Program MS Excel Service managers and commercial Sales Reps use this software to perform the step-by-step functions of a professional service agreement surveying, estimating, and pricing procedure. The benefit objective is to increase profitability by implementing a professional approach to accurately and efficiently gathering customer and scope of work job data, decreasing estimating human errors, reducing work-related risk liabilities, and by improving the customer's understanding how service agreement proposal development standardization increases efficiencies while reducing business risk to the company. Includes a complete set of 72-built-in equipment and filter estimating labor and material standards for packaged RTU, built-up systems, central plant heating/cooling, and associated equipment. This software tool is provided in original MS Excel format.	\$499.95

e. 1-hour part-three:

- f. Selecting Which Project Pricing Method to Use.
- g. Most Common - Single Divisor Project Pricing Method Review.
- h. EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement.
- i. Most Accurate – Project Dual Rate Overhead Project Pricing Method Review.
- j. Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.

k. Subscription provided or purchase these documents:

1007	<p><i>EasyPrice Dual Rate Overhead Project Pricing Calculator MS Excel</i></p> <p>This job pricing method utilizes two overhead rates for subcontractors, equipment, and materials and one for direct labor. The main reason to use this method is that overhead is more accurately distributed based on the percentage of install labor to non-labor and materials direct costs on a job.</p> <p>Overhead is allocated higher for projects with a large proportion of the job is installation labor versus equipment, materials, and subcontracts. Overheads are less where installation labor is small than non-labor and direct material costs.</p>	\$99.95
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#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part one:

- a. Segmenting Commercial HVAC Markets is More Effective than Generic Marketing.
- b. Medium and Large Government Building Buyer Profile & Sales Positioning.
- c. Commercial Building Buyer Profile & Sales Positioning.
- d. Industrial Building Buyer Profile & Sales Positioning.
- e. College/University Building Buyer Profile & Sales Positioning.
- f. Healthcare Building Buyer Profile & Sales Positioning.
- g. Understanding Building Owner/Operator Roles & Responsibilities.
- h. **Subscription provided or purchase these documents:**

Product ID 2007	<p><i>Receive the industry Profiles and Understanding Building Owner/Operator Roles & Responsibilities profiles in MS Word</i></p> <p>This document provides you with all industry profiles as well as the buyer job responsibilities and duties profile as shown in course and enables you to add other industries or update the provided industry and client buyer job description profiles.</p>	\$99.95
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2. 1-hour part two:

- a. An Effective Step-by-Step Commercial Lead Generation Strategy and Tactical Plan.
- b. Overcome Common Commercial HVAC Sales Objections.
- c. The 10 Commandments of Time Management.
- d. Organization Option for Implementing Commercial Lead Generation.
- e. **Subscription provided or purchase these documents:**

Product ID 1008	Commercial HVAC Contractor Introduction Letter & Line Card Templates You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM & Customized letter & line Card to better Position the company as an industry HVAC expert.	\$99.95
1009	Commercial Lead Generation Outbound Sales Call Script Lead generation is about building your customer base by retaining and adding new customers. Lead generation is an essential business process to consistently acquire new commercial business through the design, production, and direct marketing tasking efforts within your sales area. Marketing is the same thing as lead generation, which is the process of systematic customer awareness communications. The process involves using a 12-step lead generation implementation plan: <ol style="list-style-type: none"> 1. Identify capabilities as derived by you and your staff's experience and expertise. 2. Identify packages of offerings based on your staff capabilities. 3. Identify target markets that fit your capabilities. 4. Obtain a target commercial business list of owner-occupied industries. 5. Import into a contact management program (e.g., Outlook). 6. Set specific weekly goals for the number of prospects contacted, called, mailed & follow-up. 7. Set specific weekly new business appointments. 8. Clean target group list with decision makers names. 9. Mail introduction letter and line card. 10. Follow-up to identify client scope of work and develop proposals. 11. Set an appointment to present and close the business. 12. Reporting lead generation performance to a business development plan. 	\$99.95
Product ID 1010	Performance Tasking & Quota Tracking & Reporting in MS Excel To report Actual Sales Tasking Plan to Quota Performance for: <ul style="list-style-type: none"> • Sales Tasking Quotas - It is the Sales Manager identifies that sets Sales Rep tasking plan quotas for service agreements and jobs by individual Sales Reps. • Demand Service Performance Measurement - At the end of each day/week, the Sales Rep's total actual new account Demand Service and total sold to date are tracked by Service Manager and reported to the Sales Rep and the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Service Agreement Performance Measurement - At the end of each day/week, the Sales Rep's total actual Service Agreements and total Service Agreements sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. 	\$99.95

	<ul style="list-style-type: none"> Project Performance Measurement - At the end of each day/week, the Sales Rep's total actual Projects and total Projects sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. 	
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3. 1-hour part three:

- Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- Technician Repair Call Check-in Opportunity Assessment Forms.
- Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. Subscription provided or purchase these documents:

Product ID 1011	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep: <ul style="list-style-type: none"> To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. To provide the means to project a professional image. Systematically gather customer & technical info. To provide the means to demonstrate performance via your best practice project installation approach. To educate and move the customer from the lowest cost option to the BEST option. To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	\$99.95
Product ID 1012	Technician Repair Call Check-in Opportunity Assessment Form In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form	\$99.95
1013	Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled <i>System Condition Report</i> . This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the	\$99.95

	end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. When used with Microsoft Office and the obtained customer's email address or cell phone number, this form enables the contractor to continue post-call harvest opportunities that remain to need attention.	
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4. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID 1018	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	<i>\$99.95</i>
1019	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	<i>\$99.95</i>
1020	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different? (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during and after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	<i>\$99.95</i>
1021	<i>Project/Design-Build Agreement Proposal Template</i> Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	<i>\$99.95</i>
	<i>Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word</i>	

1022	<p>A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include:</p> <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95
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#3 How to Win More Business by Differentiating Your Services

1. 1-hour part one:

- a. Review of purpose and how to create powerful service brand names.
- d. Example Design-Build Project Brand & Associated Value Positioning Statement.

e. Subscription provided or purchase these documents:

Product ID	<i>Contents of this course provided in MS Word</i>	
1009	<p>You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM & Customized letter & line Card to better Position the company as an industry HVAC expert.</p>	\$99.95

#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part one:

- f. Sales Objections Always Fall into 1 of 5 Categories.
- g. The 4-Step Consultative Trust Selling Approach.
- h. Proactive Repair Trust-Selling Standard Procedures.
- i. Proactive Service Agreement Trust-Selling Standard Procedures.
- j. Types of Commercial Service Agreement Inspection & Repair Coverages.
- k. Service Agreement Maintenance Options.
- l. Pros & Cons by Service Agreement Type of Coverage.

m. Subscription provided or purchase these documents:

Product ID	<i>Proactive Repair Call Handling Tasking Procedures</i>	
1014	<p>Service managers and repair technicians use this standard procedure document to perform the step-by-step functions of a professional service call handling procedure and forms from a lead to sold repair customer checkout. This document is provided in original MS Word format to be printed on your local printer.</p>	\$99.95

Product ID 1015	<i>Proactive Service Agreement Sales Call Handling Tasking Procedures</i> Service managers and commercial Sales Reps use this standard procedure document to perform the step-by-step functions of a professional service agreement call handling step-by-step procedure from a lead to sold agreement. This document is provided in original MS Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95
Product ID 1018	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95

2. 1-hour part two:

- a. Proactive Service Agreement Trust-Selling Standard Procedures.
- b. Example: Commercial Service Agreement Long Form Maintenance Agreement.

c. Subscription provided or purchase these documents:

Product ID 1019	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
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3. 1-hour part three:

- a. Proactive Project/Design-Build Trust-Selling Standards Procedures.
- b. Example: Design-Build/Project Cover letter and Proposal Agreement.
- c. Creating a Project/Design-Build Statement of Qualifications.
- d. Example: Cover Letter and Statement of Qualifications.

e. Subscription provided or purchase these documents:

Product ID 1020	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different? (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during and after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
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Product ID 1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part one:

- f. Advantages of Work Delivery Tasking Standards.
- g. Business Functions are the Labor Tasking Activities That Must Occur.
- h. Service Repair Work Delivery Tasking Standard Procedures.
- i. **Subscription provided or purchase these documents:**

Product ID 1023	Service Repair Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to repair job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part two:

- a. Service Agreement Work Delivery Tasking Standard Procedures.
- b. Example: Commercial Service Agreement Cover letter and Proposal Agreement.
- c. **Subscription provided or purchase these documents:**

Product ID 1024	Service Agreement Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to service agreement job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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3. 1-hour part three:

- a. Project/Design-Build Work Delivery Standards Procedures.
- a. **Subscription provided or purchase these documents:**

Product ID 1025	Project/Design-Build Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to Project/Design-Build agreement job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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4. 1-hour part four:

- b. Equipment Start-up and Maintenance Tasking Standards.
- c. Management Quality Assurance Standard Procedures.
- d. Accounts Receivable and Payable Standard Procedures.

e. Subscription provided or purchase these documents:

Product ID 1026	Equipment Start-up & Maintenance Tasking Procedures These documents are used by service managers, installation managers, technicians, installers, and operations managers. HVAC service companies use this equipment start-up, text, and verification tasking procedures to adhere to the new ASHRAE standard 180P standards. These tasking procedures help you establish the minimum HVAC inspection and maintenance requirements that preserve a system's ability to achieve optimum operations. AccuTask includes 136 start-up and maintenance tasking forms for 99.9% of HVAC equipment and systems. These documents are provided in original MS Word format to be printed on your local printer.	\$159.95
1027	Accounts Receivable and Payable Standard Procedures Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

5. 1-hour part five:

- f. Inventory & Tool Control Standards Procedures.
- g. Customer Care Call Handling Standard Procedures.
- h. Customer Billing Standards.

i. Subscription provided or purchase these documents:

Product ID 1028	Inventory and Tool Control Standards Includes step-by-step company job and truck inventory control standards. General managers, service managers, and operations managers use them. This document is provided in original MS Word format to be printed on your local printer..	\$99.95
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Product ID	<i>Effective Customer Care Call Handling Standard Procedures</i> Arming the dispatcher with a professional standardized way to greet and respond to customer inquiries to include: <ul style="list-style-type: none"> • Greeting the Customer • Identify How Customer Will Pay for Today's Work • Informing the Customer of Response Time: • Identifying the Lead Source • Reminding the Customer of What Happens Next • Calling the Customer to Confirm Arrival Time • Calling to Reschedule Appointment • If a Solution Requires a Plan • Callback With a Plan 	
1029		\$99.95

6. 1-hour part six:

- j. Field Labor Productivity Optimization Standards.
- k. Service Reporting Standard Procedures.
- l. **Subscription provided or purchase these documents:**
 - i. N/A

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. Subscription provided or purchase these documents:

Product ID	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i> A strong set of terms and conditions is critical. It circumvents any confusion about what you are selling and the transaction terms by which you make the offer. Your payment and liability terms and conditions agreement are both a social and a legal contract. Your terms and conditions establish how you do business in a socially acceptable manner. Still, it is also a legally binding contract between you and your clients.	
1030		\$99.95

#7 How to Retain the Best People with Proven Employee Retention Strategies

1. 1-hour part one:

- a. Five Business Processes That Positively Affect Employee Retention.
- b. Implementing Step-by-Step Work Delivery Standard Procedures.
- c. **Subscription provided or purchase these documents:**

i. N/A

2. **1-hour part two:**

- a. Implement Performance-Based Job Descriptions.
- b. Implementing Labor Billable Efficiency & Productivity Monitoring.

c. **Subscription provided or purchase these documents:**

Product ID 1032	<i>Performance Incentive plan - Office, Technicians & Installer</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1033	<i>Performance Incentive plan - Commercial Sales Rep</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1031	<i>Complete Set Performance-Based Job Descriptions</i> These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These documents are provided in MS Word format to be printed on your local printer. Set includes: <ul style="list-style-type: none"> • Dispatcher Job Description • Commercial Sales Rep Job Description • Service & Maintenance Technician Job Description • HVAC Installer Job Description • General Manager Job Description • Operations Manager job description • Sales Manager Job Description • Service Manager Job Description • Installation Manager Job Description • Human Resource Manager Job Description • Comptroller Job Description • Project Manager Job Description • Assistant Service Manager Job Description • HVAC Technician Instructor-Trainer Job Description • Lead Service & Maintenance Technician Job Description • Receptionist/Customer Care Specialist Job Description • Office Manager Job Description • Accounts Payable Job Description • Accounts Receivable Job Description • Truck Driver/Warehouse Supervisor Job Description 	\$99.95

3. **1-hour part three:**

- d. Implement Performance Incentive Plans.
- e. Implementing a Company Culture of Success.

f. **Subscription provided or purchase these documents:**

- i. N/A

#8 How to Drive Profitability Using Key Performance Indicators

1. 1-hour:

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.
- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
- g. **Subscription provided or purchase these documents:**

- i. N/A

#9 How to Efficiently Organize the Business for Growth

1. 1-hour:

- a. Why We Need to Organize Business into Groups.
- b. Commercial HVAC Business Organizational Structure.
- c. Five Logical Commercial Organizational Groups/Departments.
- d. Office Admin Department Functions & Organizational Structure.
- e. Sales Department Functions & Organizational Structure Service.
- f. Service Functions & Organizational Structure.
- g. Installation Department Functions & Organizational Structure.
- h. Construction Department Functions & Organizational Structure.
- i. **Subscription provided or purchase these documents:**

Product ID 1036	Commercial HVAC Service Contractor Organizational Charts Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company's book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all commercial HVAC companies should be organized in such a way as to compete competitively.	\$69.95
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#10 How to Implement Proper Customer Care Call Handling Procedures

1. 1-hour:

- a. Importance of Good Customer Care.
- b. Customer Care Inbound and Outbound Call Handling Script.
- c. Crucial Hiring Criteria for the Customer Care & Dispatcher Function.
- d. Organizing an Office Central Filing System.
- e. Implement Hiring Guidelines for the Customer Care/Dispatch Function.
- f. Customer Service 101: Proper Phone Etiquette.
- g. Implement Training for the Customer Care/Dispatch Function.

h. Subscription provided or purchase these documents:

Product ID 1034	Customer Care Call Handling Inbound and Outbound Script This script includes a professional standardized way to greet and responds to the customer inquiries. The script includes greeting the customer, identifying if they are interested in a service agreement, annual service agreement renewal reminder, identifying how the customer they pay for today's work, informing the customer of response time, identifying the lead source, calling the customer to confirm arrival time, managing the price of today's service, calling to reschedule an appointment, handling upset callers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1035	Customer Care Response for "Price is Too High" Objection Used by customer care, receptionist, and dispatchers. This document is designed to inform employees and your customers why we price our services, justifying the price to the customer post service. Includes a professional standardized way to respond to a price objection via letter or email. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#11 How to Forecast Your Monthly Spend Plan

1. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.

d. Subscription provided or purchase these documents:

Product ID	BudgetPro Annual & Monthly Budgeting Calculator One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	\$159.95
1039		

#12 How to Recruit and Retain Top Performers

1. 1-hour part one:

- a. Proven Strategies to Help You Recruit the Best.
- b. Proven Strategies to Help You Retain the Best.
- c. Why Contractors are Making Bad Hiring Decisions.
- d. The Many Costs of Making a Bad Hire.
- e. Here are 9-Tips for Hiring the Right Candidate.
- f. Checklist for Hiring Employees.
- g. Checklist for Screening an Applicant Resume.

h. Subscription provided or purchase these documents:

- i. N/A

2. 1-hour part two:

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.

e. Subscription provided or purchase these documents:

Product ID 1037	Employment Application This job or employment application is an official form given to applicants asking a wide range of questions both about the individual and their skills related to the job. Forms are legally defensible and stand as a way for applicants to introduce themselves to employers. Employees can be justifiably terminated for providing false information on this document that may be found post-hire. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1038	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#13 How to Select and Implement Field Management Software

1. **1-hour:**
 - a. Benefits of Field Service Management Software.
 - b. Checklist for Selecting Field Service Management Software.
 - c. **Subscription provided or purchase these documents:**
 - i. N/A

#14 How to Self-Develop Your Leadership and People Skills

1. **1-hour:**
 - a. Different Leadership Styles and When to Use Them.
 - b. The Top Leadership Skills to Improve.
 - c. Implement Your Leadership Skill Self-Development Plan.
 - d. **Subscription provided or purchase these documents:**
 - ii. N/A

Marketing Manager Job Training Track

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-two:

- a. Commercial HVAC Service Agreement Pricing Method.
- b. Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.
- c. Locking in Projected Repair Revenue Pricing Strategy Review.
- d. **Subscription provided or purchase these documents:**

Product ID 1003	EasyPrice Service Agreement Sales Call Opportunity Assessment Form Mechanical rooms or central plant areas are logical starting points for multi-facility or multi-story facilities. Starting at the mechanical room or central plant gives the salesperson a better picture of how the conditioned air or water is distributed throughout the facility(s). Understanding how the HVAC/R system is distributed enables the salesperson to look for and ask pertinent questions related to system operating and maintenance tasking requirements.	\$99.95
1004	EasyPrice Service Agreement Estimating & Pricing Program MS Excel Service managers and commercial Sales Reps use this software to perform the step-by-step functions of a professional service agreement surveying, estimating, and pricing procedure. The benefit objective is to increase profitability by implementing a professional approach to accurately and efficiently gathering customer and scope of work job data, decreasing estimating human errors, reducing work-related risk liabilities, and by improving the customer's understanding how service agreement proposal development standardization increases efficiencies while reducing business risk to the company. Includes a complete set of 72-built-in equipment and filter estimating labor and material standards for packaged	\$499.95

	RTU, built-up systems, central plant heating/cooling, and associated equipment. This software tool is provided in original MS Excel format.	
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#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part one:

- a. Segmenting Commercial HVAC Markets is More Effective than Generic Marketing.
- b. Medium and Large Government Building Buyer Profile & Sales Positioning.
- c. Commercial Building Buyer Profile & Sales Positioning.
- d. Industrial Building Buyer Profile & Sales Positioning.
- e. College/University Building Buyer Profile & Sales Positioning.
- f. Healthcare Building Buyer Profile & Sales Positioning.
- g. Understanding Building Owner/Operator Roles & Responsibilities.
- h. **Subscription provided or purchase these documents:**

Product ID 2007	<i>Receive the industry Profiles and Understanding Building Owner/Operator Roles & Responsibilities profiles in MS Word</i> This document provides you with all industry profiles as well as the buyer job responsibilities and duties profile as shown in course and enables you to add other industries or update the provided industry and client buyer job description profiles.	\$99.95
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2. 1-hour part two:

- a. An Effective Step-by-Step Commercial Lead Generation Strategy and Tactical Plan.
- b. Overcome Common Commercial HVAC Sales Objections.
- c. The 10 Commandments of Time Management.
- d. Organization Option for Implementing Commercial Lead Generation.
- e. **Subscription provided or purchase these documents:**

Product ID 1008	<i>Commercial HVAC Contractor Introduction Letter & Line Card Templates</i> You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM & Customized letter & line Card to better Position the company as an industry HVAC expert.	\$99.95
1009	<i>Commercial Lead Generation Outbound Sales Call Script</i> Lead generation is about building your customer base by retaining and adding new customers. Lead generation is an essential business process to consistently acquire new commercial business through the design, production, and direct marketing tasking efforts within your sales area. Marketing is the same thing as lead generation, which is the process of	\$99.95

	<p>systematic customer awareness communications. The process involves using a 12-step lead generation implementation plan:</p> <ol style="list-style-type: none"> 13. Identify capabilities as derived by you and your staff's experience and expertise. 14. Identify packages of offerings based on your staff capabilities. 15. Identify target markets that fit your capabilities. 16. Obtain a target commercial business list of owner-occupied industries. 17. Import into a contact management program (e.g., Outlook). 18. Set specific weekly goals for the number of prospects contacted, called, mailed & follow-up. 19. Set specific weekly new business appointments. 20. Clean target group list with decision makers names. 21. Mail introduction letter and line card. 22. Follow-up to identify client scope of work and develop proposals. 23. Set an appointment to present and close the business. 24. Reporting lead generation performance to a business development plan. 	
<p>Product ID</p> <p>1010</p>	<p><i>Performance Tasking & Quota Tracking & Reporting in MS Excel</i></p> <p>To report Actual Sales Tasking Plan to Quota Performance for:</p> <ul style="list-style-type: none"> • Sales Tasking Quotas - It is the Sales Manager identifies that sets Sales Rep tasking plan quotas for service agreements and jobs by individual Sales Reps. • Demand Service Performance Measurement - At the end of each day/week, the Sales Rep's total actual new account Demand Service and total sold to date are tracked by Service Manager and reported to the Sales Rep and the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Service Agreement Performance Measurement - At the end of each day/week, the Sales Rep's total actual Service Agreements and total Service Agreements sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Project Performance Measurement - At the end of each day/week, the Sales Rep's total actual Projects and total Projects sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. 	<p>\$99.95</p>

3. 1-hour part three:

- a. Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- b. Technician Repair Call Check-in Opportunity Assessment Forms.
- c. Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. Subscription provided or purchase these documents:

Product ID 1011	Install-Right Project/Design-Build Sales Call Opportunity Assessment Form This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep: <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. • To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	\$99.95
Product ID 1012	Technician Repair Call Check-in Opportunity Assessment Form In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form	\$99.95
1013	Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled System Condition Report . This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. When used with Microsoft Office and the obtained customer's email address or cell phone number, this form enables the contractor to continue post-call harvest opportunities that remain to need attention.	\$99.95

4. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID 1018	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
1019	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
1020	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different? (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during and after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1021	<i>Project/Design-Build Agreement Proposal Template</i> Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	<i>Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word</i> A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#3 How to Win More Business by Differentiating Your Services

1. 1-hour:

- a. Review of purpose and how to create powerful service brand names.
- d. Example Design-Build Project Brand & Associated Value Positioning Statement.

e. Subscription provided or purchase these documents:

Product ID	Contents of this course provided in MS Word	
1009	You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM & Customized letter & line Card to better Position the company as an industry HVAC expert.	\$99.95

#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part one:

- f. Sales Objections Always Fall into 1 of 5 Categories.
- g. The 4-Step Consultative Trust Selling Approach.
- h. Proactive Repair Trust-Selling Standard Procedures.
- i. Proactive Service Agreement Trust-Selling Standard Procedures.
- j. Types of Commercial Service Agreement Inspection & Repair Coverages.
- k. Service Agreement Maintenance Options.
- l. Pros & Cons by Service Agreement Type of Coverage.

m. Subscription provided or purchase these documents:

Product ID	Proactive Repair Call Handling Tasking Procedures	
1014	Service managers and repair technicians use this standard procedure document to perform the step-by-step functions of a professional service call handling procedure and forms from a lead to sold repair customer checkout. This document is provided in original MS Word format to be printed on your local printer.	\$99.95
1015	Proactive Service Agreement Sales Call Handling Tasking Procedures Service managers and commercial Sales Reps use this standard procedure document to perform the step-by-step functions of a professional service agreement call handling step-by-step procedure from a lead to sold agreement. This document is provided in original MS Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95
1018	Service Agreement Sales First Call Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95

4. 1-hour part two:

- a. Proactive Service Agreement Trust-Selling Standard Procedures.
- b. Example: Commercial Service Agreement Long Form Maintenance Agreement.
- c. **Subscription provided or purchase these documents:**

Product ID 1019	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
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2. 1-hour part three:

- a. Proactive Project/Design-Build Trust-Selling Standards Procedures.
- b. Example: Design-Build/Project Cover letter and Proposal Agreement.
- c. Creating a Project/Design-Build Statement of Qualifications.
- d. Example: Cover Letter and Statement of Qualifications.

e. Subscription provided or purchase these documents:

Product ID 1020	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different? (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during and after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1021	<i>Project/Design-Build Agreement Proposal Template</i> Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	<i>Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word</i> A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none">• Highlight your construction skills and experiences.• Quantify your key achievements.• Show the prospect why you are an excellent match.	\$99.95

#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

7. 1-hour part six:

- m. Field Labor Productivity Optimization Standards.
- n. Service Reporting Standard Procedures.
- o. **Subscription provided or purchase these documents:**
 - i. N/A

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.
- e. **Subscription provided or purchase these documents:**

<i>Product ID</i>	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i>	
1030	A strong set of terms and conditions is critical. It circumvents any confusion about what you are selling and the transaction terms by which you make the offer. Your payment and liability terms and conditions agreement are both a social and a legal contract. Your terms and conditions establish how you do business in a socially acceptable manner. Still, it is also a legally binding contract between you and your clients.	\$99.95

#7 How to Retain the Best People with Proven Employee Retention Strategies

1. 1-hour part one:

- a. Five Business Processes That Positively Affect Employee Retention.
- b. Implementing Step-by-Step Work Delivery Standard Procedures.
- c. **Subscription provided or purchase these documents:**
 - ii. N/A

2. 1-hour part two:

- a. Implement Performance-Based Job Descriptions.
- b. Implementing Labor Billable Efficiency & Productivity Monitoring.
- c. **Subscription provided or purchase these documents:**

<i>Product ID</i>	<i>Performance Incentive plan - Office, Technicians & Installer</i>	
1032	Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

1033	<i>Performance Incentive plan - Commercial Sales Rep</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1031	<i>Complete Set Performance-Based Job Descriptions</i> These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These documents are provided in MS Word format to be printed on your local printer. Set includes: <ul style="list-style-type: none"> • Dispatcher Job Description • Commercial Sales Rep Job Description • Service & Maintenance Technician Job Description • HVAC Installer Job Description • General Manager Job Description • Operations Manager job description • Sales Manager Job Description • Service Manager Job Description • Installation Manager Job Description • Human Resource Manager Job Description • Comptroller Job Description • Project Manager Job Description • Assistant Service Manager Job Description • HVAC Technician Instructor-Trainer Job Description • Lead Service & Maintenance Technician Job Description • Receptionist/Customer Care Specialist Job Description • Office Manager Job Description • Accounts Payable Job Description • Accounts Receivable Job Description • Truck Driver/Warehouse Supervisor Job Description 	\$99.95

4. **1-hour part three:**

- d. Implement Performance Incentive Plans.
- e. Implementing a Company Culture of Success.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#8 How to Drive Profitability Using Key Performance Indicators

2. **1-hour:**

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.

- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
- g. **Subscription provided or purchase these documents:**
 - i. N/A

#9 How to Efficiently Organize the Business for Growth

1. 1-hour:

- a. Why We Need to Organize Business into Groups.
- b. Commercial HVAC Business Organizational Structure.
- c. Five Logical Commercial Organizational Groups/Departments.
- d. Office Admin Department Functions & Organizational Structure.
- e. Sales Department Functions & Organizational Structure Service.
- f. Service Functions & Organizational Structure.
- g. Installation Department Functions & Organizational Structure.
- h. Construction Department Functions & Organizational Structure.
- i. **Subscription provided or purchase these documents:**

Product ID	<i>Commercial HVAC Service Contractor Organizational Charts</i>	
1036	Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company's book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all commercial HVAC companies should be organized in such a way as to compete competitively.	\$69.95

#10 How to Implement Proper Customer Care Call Handling Procedures

1. 1-hour:

- a. Importance of Good Customer Care.
- b. Customer Care Inbound and Outbound Call Handling Script.
- c. Crucial Hiring Criteria for the Customer Care & Dispatcher Function.
- d. Organizing an Office Central Filing System.
- e. Implement Hiring Guidelines for the Customer Care/Dispatch Function.
- f. Customer Service 101: Proper Phone Etiquette.
- g. Implement Training for the Customer Care/Dispatch Function.
- h. **Subscription provided or purchase these documents:**

Product ID 1034	Customer Care Call Handling Inbound and Outbound Script This script includes a professional standardized way to greet and responds to the customer inquiries. The script includes greeting the customer, identifying if they are interested in a service agreement, annual service agreement renewal reminder, identifying how the customer they pay for today's work, informing the customer of response time, identifying the lead source, calling the customer to confirm arrival time, managing the price of today's service, calling to reschedule an appointment, handling upset callers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1035	Customer Care Response for "Price is Too High" Objection Used by customer care, receptionist, and dispatchers. This document is designed to inform employees and your customers why we price our services, justifying the price to the customer post service. Includes a professional standardized way to respond to a price objection via letter or email. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#11 How to Forecast Your Monthly Spend Plan

2. 1-hour:

- Why You Need a Monthly Spend Plan Budget.
- Forecasting Labor Staffing Requirement by Work Category Procedure.
- Using BudgetPro to Develop Service Offerings Spend Plans.

d. Subscription provided or purchase these documents:

Product ID 1039	BudgetPro Annual & Monthly Budgeting Calculator One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	\$159.95
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#12 How to Recruit and Retain Top Performers

3. 1-hour part one:

- Proven Strategies to Help You Recruit the Best.
- Proven Strategies to Help You Retain the Best.
- Why Contractors are Making Bad Hiring Decisions.

- d. The Many Costs of Making a Bad Hire.
- e. Here are 9-Tips for Hiring the Right Candidate.
- f. Checklist for Hiring Employees.
- g. Checklist for Screening an Applicant Resume.
- h. **Subscription provided or purchase these documents:**
 - i. N/A

4. **1-hour part two:**

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.
- e. **Subscription provided or purchase these documents:**

Product ID 1037	Employment Application This job or employment application is an official form given to applicants asking a wide range of questions both about the individual and their skills related to the job. Forms are legally defensible and stand as a way for applicants to introduce themselves to employers. Employees can be justifiably terminated for providing false information on this document that may be found post-hire. his document is provided in original MS Word format to be printed on your local printer.	\$69.95
1038	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#13 How to Select and Implement Field Management Software

2. **1-hour:**

- a. Benefits of Field Service Management Software.
- b. Checklist for Selecting Field Service Management Software.
- c. **Subscription provided or purchase these documents:**
 - i. N/A

#14 How to Self-Develop Your Leadership and People Skills

2. **1-hour:**

- a. Different Leadership Styles and When to Use Them.
- b. The Top Leadership Skills to Improve.
- c. Implement Your Leadership Skill Self-Development Plan.

d. **Subscription provided or purchase these documents:**

ii. N/A

Office Manager Job Training Track

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part one:

- f. Advantages of Work Delivery Tasking Standards.
- g. Business Functions are the Labor Tasking Activities That Must Occur.
- h. Service Repair Work Delivery Tasking Standard Procedures.
- i. **Subscription provided or purchase these documents:**

Product ID 1023	<i>Service Repair Work Delivery Standard Procedures</i> Includes step-by-step work delivery tasking standards from a lead to repair job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	<i>\$159.95</i>
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2. 1-hour part five:

- p. Inventory & Tool Control Standards Procedures.
- q. Customer Care Call Handling Standard Procedures.
- r. Customer Billing Standards.
- s. **Subscription provided or purchase these documents:**

Product ID 1028	<i>Inventory and Tool Control Standards</i> Includes step-by-step company job and truck inventory control standards. General managers, service managers, and operations managers use them. This document is provided in original MS Word format to be printed on your local printer..	<i>\$99.95</i>
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Product ID	<i>Effective Customer Care Call Handling Standard Procedures</i> Arming the dispatcher with a professional standardized way to greet and respond to customer inquiries to include: <ul style="list-style-type: none"> • Greeting the Customer • Identify How Customer Will Pay for Today's Work • Informing the Customer of Response Time: • Identifying the Lead Source • Reminding the Customer of What Happens Next • Calling the Customer to Confirm Arrival Time • Calling to Reschedule Appointment • If a Solution Requires a Plan • Callback With a Plan 	
1029		\$99.95

3. 1-hour part six:

- t. Field Labor Productivity Optimization Standards.
- u. Service Reporting Standard Procedures.
- v. **Subscription provided or purchase these documents:**
 - i. N/A

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.
- e. **Subscription provided or purchase these documents:**

Product ID	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i> A strong set of terms and conditions is critical. It circumvents any confusion about what you are selling and the transaction terms by which you make the offer. Your payment and liability terms and conditions agreement are both a social and a legal contract. Your terms and conditions establish how you do business in a socially acceptable manner. Still, it is also a legally binding contract between you and your clients.	
1030		\$99.95

#7 How to Retain the Best People with Proven Employee Retention Strategies

1. 1-hour part one:

- a. Five Business Processes That Positively Affect Employee Retention.
- b. Implementing Step-by-Step Work Delivery Standard Procedures.
- c. **Subscription provided or purchase these documents:**

iii. N/A

2. 1-hour part two:

- a. Implement Performance-Based Job Descriptions.
- b. Implementing Labor Billable Efficiency & Productivity Monitoring.
- c. **Subscription provided or purchase these documents:**

Product ID 1032	<i>Performance Incentive plan - Office, Technicians & Installer</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1033	<i>Performance Incentive plan - Commercial Sales Rep</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1031	<i>Complete Set Performance-Based Job Descriptions</i> These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These documents are provided in MS Word format to be printed on your local printer. Set includes: <ul style="list-style-type: none"> • Dispatcher Job Description • Commercial Sales Rep Job Description • Service & Maintenance Technician Job Description • HVAC Installer Job Description • General Manager Job Description • Operations Manager job description • Sales Manager Job Description • Service Manager Job Description • Installation Manager Job Description • Human Resource Manager Job Description • Comptroller Job Description • Project Manager Job Description • Assistant Service Manager Job Description • HVAC Technician Instructor-Trainer Job Description • Lead Service & Maintenance Technician Job Description • Receptionist/Customer Care Specialist Job Description • Office Manager Job Description • Accounts Payable Job Description • Accounts Receivable Job Description • Truck Driver/Warehouse Supervisor Job Description 	\$99.95

#9 How to Efficiently Organize the Business for Growth

1. 1-hour:

- a. Why We Need to Organize Business into Groups.

- b. Commercial HVAC Business Organizational Structure.
- c. Five Logical Commercial Organizational Groups/Departments.
- d. Office Admin Department Functions & Organizational Structure.
- e. Sales Department Functions & Organizational Structure Service.
- f. Service Functions & Organizational Structure.
- g. Installation Department Functions & Organizational Structure.
- h. Construction Department Functions & Organizational Structure.

i. Subscription provided or purchase these documents:

Product ID	Commercial HVAC Service Contractor Organizational Charts	
1036	Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company's book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all commercial HVAC companies should be organized in such a way as to compete competitively.	\$69.95

#10 How to Implement Proper Customer Care Call Handling Procedures

1. 1-hour:

- a. Importance of Good Customer Care.
- b. Customer Care Inbound and Outbound Call Handling Script.
- c. Crucial Hiring Criteria for the Customer Care & Dispatcher Function.
- d. Organizing an Office Central Filing System.
- e. Implement Hiring Guidelines for the Customer Care/Dispatch Function.
- f. Customer Service 101: Proper Phone Etiquette.
- g. Implement Training for the Customer Care/Dispatch Function.

h. Subscription provided or purchase these documents:

Product ID	Customer Care Call Handling Inbound and Outbound Script	
1034	This script includes a professional standardized way to greet and responds to the customer inquiries. The script includes greeting the customer, identifying if they are interested in a service agreement, annual service agreement renewal reminder, identifying how the customer they pay for today's work, informing the customer of response time, identifying the lead source, calling the customer to confirm arrival time, managing the price of today's service, calling to reschedule an appointment, handling upset callers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

Product ID 1035	Customer Care Response for “Price is Too High” Objection Used by customer care, receptionist, and dispatchers. This document is designed to inform employees and your customers why we price our services, justifying the price to the customer post service. Includes a professional standardized way to respond to a price objection via letter or email. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
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#11 How to Forecast Your Monthly Spend Plan

1. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.

d. Subscription provided or purchase these documents:

Product ID 1039	BudgetPro Annual & Monthly Budgeting Calculator One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	\$159.95
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#12 How to Recruit and Retain Top Performers

1. 1-hour part one:

- a. Proven Strategies to Help You Recruit the Best.
- b. Proven Strategies to Help You Retain the Best.
- c. Why Contractors are Making Bad Hiring Decisions.
- d. The Many Costs of Making a Bad Hire.
- e. Here are 9-Tips for Hiring the Right Candidate.
- f. Checklist for Hiring Employees.
- g. Checklist for Screening an Applicant Resume.

h. Subscription provided or purchase these documents:

i. N/A

2. 1-hour part two:

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.
- e. **Subscription provided or purchase these documents:**

Product ID 1037	Employment Application This job or employment application is an official form given to applicants asking a wide range of questions both about the individual and their skills related to the job. Forms are legally defensible and stand as a way for applicants to introduce themselves to employers. Employees can be justifiably terminated for providing false information on this document that may be found post-hire. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1038	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#13 How to Select and Implement Field Management Software

1. **1-hour:**
 - a. Benefits of Field Service Management Software.
 - b. Checklist for Selecting Field Service Management Software.
 - c. **Subscription provided or purchase these documents:**
 - i. N/A

#14 How to Self-Develop Your Leadership and People Skills

1. **1-hour:**
 - a. Different Leadership Styles and When to Use Them.
 - b. The Top Leadership Skills to Improve.
 - c. Implement Your Leadership Skill Self-Development Plan.
 - d. **Subscription provided or purchase these documents:**
 - ii. N/A

Receptionist Job Training Track

Pilot - How to Master a Thriving Commercial HVAC Service Business

2. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part one:

- j. Advantages of Work Delivery Tasking Standards.
- k. Business Functions are the Labor Tasking Activities That Must Occur.
- l. Service Repair Work Delivery Tasking Standard Procedures.
- m. **Subscription provided or purchase these documents:**

Product ID 1023	Service Repair Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to repair job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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#10 How to Implement Proper Customer Care Call Handling Procedures

1. 1-hour:

- a. Importance of Good Customer Care.
- b. Customer Care Inbound and Outbound Call Handling Script.
- c. Crucial Hiring Criteria for the Customer Care & Dispatcher Function.
- d. Organizing an Office Central Filing System.
- e. Implement Hiring Guidelines for the Customer Care/Dispatch Function.
- f. Customer Service 101: Proper Phone Etiquette.
- g. Implement Training for the Customer Care/Dispatch Function.
- h. **Subscription provided or purchase these documents:**

Product ID 1034	<i>Customer Care Call Handling Inbound and Outbound Script</i> This script includes a professional standardized way to greet and responds to the customer inquiries. The script includes greeting the customer, identifying if they are interested in a service agreement, annual service agreement renewal reminder, identifying how the customer they pay for today's work, informing the customer of response time, identifying the lead source, calling the customer to confirm arrival time, managing the price of today's service, calling to reschedule an appointment, handling upset callers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1035	<i>Customer Care Response for "Price is Too High" Objection</i> Used by customer care, receptionist, and dispatchers. This document is designed to inform employees and your customers why we price our services, justifying the price to the customer post service. Includes a professional standardized way to respond to a price objection via letter or email. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

Bookkeeper Job Training Track

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part one:

- n. Advantages of Work Delivery Tasking Standards.
- o. Business Functions are the Labor Tasking Activities That Must Occur.
- p. Service Repair Work Delivery Tasking Standard Procedures.
- q. **Subscription provided or purchase these documents:**

Product ID 1023	Service Repair Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to repair job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part four:

- w. Equipment Start-up and Maintenance Tasking Standards.
- x. Management Quality Assurance Standard Procedures.
- y. Accounts Receivable and Payable Standard Procedures.
- z. **Subscription provided or purchase these documents:**

Product ID 1026	Equipment Start-up & Maintenance Tasking Procedures These documents are used by service managers, installation managers, technicians, installers, and operations managers. HVAC service companies use this equipment start-up, text, and verification tasking procedures to adhere to the new ASHRAE standard 180P standards. These tasking procedures help you establish the minimum HVAC inspection and maintenance requirements that preserve a system's ability to achieve optimum operations. AccuTask includes 136 start-up and maintenance tasking forms for 99.9% of HVAC equipment and	\$159.95
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	systems. These documents are provided in original MS Word format to be printed on your local printer.	
1027	<i>Accounts Receivable and Payable Standard Procedures</i> Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

#8 How to Drive Profitability Using Key Performance Indicators

1. 1-hour:

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.
- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
- d. **Subscription provided or purchase these documents:**
 - i. N/A

#11 How to Forecast Your Monthly Spend Plan

2. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.
- d. **Subscription provided or purchase these documents:**

Product ID	<i>BudgetPro Annual & Monthly Budgeting Calculator</i> One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	\$159.95
1039		

Accounting Job Training Track

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

3. 1-hour part one:

- r. Advantages of Work Delivery Tasking Standards.
- s. Business Functions are the Labor Tasking Activities That Must Occur.
- t. Service Repair Work Delivery Tasking Standard Procedures.
- u. **Subscription provided or purchase these documents:**

Product ID 1023	<i>Service Repair Work Delivery Standard Procedures</i> Includes step-by-step work delivery tasking standards from a lead to repair job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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4. 1-hour part four:

- aa. Equipment Start-up and Maintenance Tasking Standards.
- bb. Management Quality Assurance Standard Procedures.
- cc. Accounts Receivable and Payable Standard Procedures.

dd. Subscription provided or purchase these documents:

Product ID 1026	<i>Equipment Start-up & Maintenance Tasking Procedures</i> These documents are used by service managers, installation managers, technicians, installers, and operations managers. HVAC service companies use this equipment start-up, text, and verification tasking procedures to adhere to the new ASHRAE standard 180P standards. These tasking procedures help you establish the minimum HVAC inspection and maintenance requirements that preserve a system's ability to achieve optimum operations. AccuTask includes 136 start-up and maintenance tasking forms for 99.9% of HVAC equipment and systems. These documents are provided in original MS Word format to be printed on your local printer.	\$159.95
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1027	<i>Accounts Receivable and Payable Standard Procedures</i> Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95
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#8 How to Drive Profitability Using Key Performance Indicators

2. 1-hour:

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.
- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
- e. **Subscription provided or purchase these documents:**
 - i. N/A

#11 How to Forecast Your Monthly Spend Plan

3. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.
- d. **Subscription provided or purchase these documents:**

Product ID 1039	<i>BudgetPro Annual & Monthly Budgeting Calculator</i> One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	\$159.95
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Sales Manager Job Training Track

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-two:

- a. Commercial HVAC Service Agreement Pricing Method.
- b. Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.
- c. Locking in Projected Repair Revenue Pricing Strategy Review.
- d. **Subscription provided or purchase these documents:**

Product ID 1003	EasyPrice Service Agreement Sales Call Opportunity Assessment Form Mechanical rooms or central plant areas are logical starting points for multi-facility or multi-story facilities. Starting at the mechanical room or central plant gives the salesperson a better picture of how the conditioned air or water is distributed throughout the facility(s). Understanding how the HVAC/R system is distributed enables the salesperson to look for and ask pertinent questions related to system operating and maintenance tasking requirements.	\$99.95
1004	EasyPrice Service Agreement Estimating & Pricing Program MS Excel Service managers and commercial Sales Reps use this software to perform the step-by-step functions of a professional service agreement surveying, estimating, and pricing procedure. The benefit objective is to increase profitability by implementing a professional approach to accurately and efficiently gathering customer and scope of work job data, decreasing estimating human errors, reducing work-related risk liabilities, and by improving the customer's understanding how service agreement proposal development standardization increases efficiencies while reducing business risk to the company. Includes a complete set of 72-built-in equipment and filter estimating labor and material standards for packaged	\$499.95

	RTU, built-up systems, central plant heating/cooling, and associated equipment. This software tool is provided in original MS Excel format.	
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2. 1-hour part-three:

- a. Selecting Which Project Pricing Method to Use.
- b. Most Common - Single Divisor Project Pricing Method Review.
- c. EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement.
- d. Most Accurate – Project Dual Rate Overhead Project Pricing Method Review.
- e. Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.

f. Subscription provided or purchase these documents:

Product ID	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep: <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. To provide the means to complete the sales call and close the transaction in 2 sales calls or less.	\$99.95
1005		
	<i>EasyPrice Commercial/Industrial Project Single Divisor Pricing Calculator MS Excel</i> When setting service pricing for your HVAC business, you need to understand that there are two types of business costs - direct and indirect or overhead costs. Direct costs are the cost of goods sold required to deliver work from a lead to job closeout. It includes parts, equipment, materials, ductwork, permits, labor, and vehicle expenses. Business owners typically price their work where most projects represent 60% or higher in equipment, materials, and subs. On the other hand, the indirect or overhead cost keeps the lights on and sustainable. Your overhead costs include your mortgage/lease/rent, utility expenses, admin and sales salary, uniforms, employee training, and trash removal. You need an accurate pricing method to compete on large or multi-	\$99.95
1006		

	phase jobs. The single divisor pricing method uses an average overhead recovery which can overprice a job.	
Product ID 1007	<i>EasyPrice Dual Rate Overhead Project Pricing Calculator MS Excel</i> This job pricing method utilizes two overhead rates for subcontractors, equipment, and materials and one for direct labor. The main reason to use this method is that overhead is more accurately distributed based on the percentage of install labor to non-labor and materials direct costs on a job. Overhead is allocated higher for projects with a large proportion of the job is installation labor versus equipment, materials, and subcontracts. Overheads are less where installation labor is small than non-labor and direct material costs.	\$99.95

#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part one:

- a. Segmenting Commercial HVAC Markets is More Effective than Generic Marketing.
- b. Medium and Large Government Building Buyer Profile & Sales Positioning.
- c. Commercial Building Buyer Profile & Sales Positioning.
- d. Industrial Building Buyer Profile & Sales Positioning.
- e. College/University Building Buyer Profile & Sales Positioning.
- f. Healthcare Building Buyer Profile & Sales Positioning.
- g. Understanding Building Owner/Operator Roles & Responsibilities.
- h. **Subscription provided or purchase these documents:**

Product ID 2007	<i>Receive the industry Profiles and Understanding Building Owner/Operator Roles & Responsibilities profiles in MS Word</i> This document provides you with all industry profiles as well as the buyer job responsibilities and duties profile as shown in course and enables you to add other industries or update the provided industry and client buyer job description profiles.	\$99.95
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2. 1-hour part two:

- a. An Effective Step-by-Step Commercial Lead Generation Strategy and Tactical Plan.
- b. Overcome Common Commercial HVAC Sales Objections.
- c. The 10 Commandments of Time Management.
- d. Organization Option for Implementing Commercial Lead Generation.
- e. **Subscription provided or purchase these documents:**

Product ID 1008	<i>Commercial HVAC Contractor Introduction Letter & Line Card Templates</i> You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM &	\$99.95
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	Customized letter & line Card to better Position the company as an industry HVAC expert.	
Product ID 1009	<p><i>Commercial Lead Generation Outbound Sales Call Script</i></p> <p>Lead generation is about building your customer base by retaining and adding new customers. Lead generation is an essential business process to consistently acquire new commercial business through the design, production, and direct marketing tasking efforts within your sales area. Marketing is the same thing as lead generation, which is the process of systematic customer awareness communications. The process involves using a 12-step lead generation implementation plan:</p> <ol style="list-style-type: none"> 25. Identify capabilities as derived by you and your staff's experience and expertise. 26. Identify packages of offerings based on your staff capabilities. 27. Identify target markets that fit your capabilities. 28. Obtain a target commercial business list of owner-occupied industries. 29. Import into a contact management program (e.g., Outlook). 30. Set specific weekly goals for the number of prospects contacted, called, mailed & follow-up. 31. Set specific weekly new business appointments. 32. Clean target group list with decision makers names. 33. Mail introduction letter and line card. 34. Follow-up to identify client scope of work and develop proposals. 35. Set an appointment to present and close the business. 36. Reporting lead generation performance to a business development plan. 	\$99.95
1010	<p><i>Performance Tasking & Quota Tracking & Reporting in MS Excel</i></p> <p>To report Actual Sales Tasking Plan to Quota Performance for:</p> <ul style="list-style-type: none"> • Sales Tasking Quotas - It is the Sales Manager identifies that sets Sales Rep tasking plan quotas for service agreements and jobs by individual Sales Reps. • Demand Service Performance Measurement - At the end of each day/week, the Sales Rep's total actual new account Demand Service and total sold to date are tracked by Service Manager and reported to the Sales Rep and the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Service Agreement Performance Measurement - At the end of each day/week, the Sales Rep's total actual Service Agreements and total Service Agreements sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Project Performance Measurement - At the end of each day/week, the Sales Rep's total actual Projects and total Projects sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales 	\$99.95

	Manager.	
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3. 1-hour part three:

- a. Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- b. Technician Repair Call Check-in Opportunity Assessment Forms.
- c. Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. Subscription provided or purchase these documents:

Product ID 1011	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep: <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. • To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	\$99.95
Product ID 1012	<i>Technician Repair Call Check-in Opportunity Assessment Form</i> In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form	\$99.95
Product ID 1013	<i>Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms</i> Entitled <i>System Condition Report</i> . This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager	\$99.95

	for pricing work and following up with the customer on the recommended work that needs attention. When used with Microsoft Office and the obtained customer's email address or cell phone number, this form enables the contractor to continue post-call harvest opportunities that remain to need attention.	
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4. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
1018		
	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
1019		
	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different? (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during and after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1020		
	<i>Project/Design-Build Agreement Proposal Template</i> Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1021		
	<i>Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word</i> A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications	\$99.95
1022		

	tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	
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#3 How to Win More Business by Differentiating Your Services

1. 1-hour part one:

- a. Review of purpose and how to create powerful service brand names.
- d. Example Design-Build Project Brand & Associated Value Positioning Statement.

e. Subscription provided or purchase these documents:

Product ID	Contents of this course provided in MS Word	
1009	You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM & Customized letter & line Card to better Position the company as an industry HVAC expert.	\$99.95

#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part one:

- f. Sales Objections Always Fall into 1 of 5 Categories.
- g. The 4-Step Consultative Trust Selling Approach.
- h. Proactive Repair Trust-Selling Standard Procedures.
- i. Proactive Service Agreement Trust-Selling Standard Procedures.
- j. Types of Commercial Service Agreement Inspection & Repair Coverages.
- k. Service Agreement Maintenance Options.
- l. Pros & Cons by Service Agreement Type of Coverage.

m. Subscription provided or purchase these documents:

Product ID	Proactive Repair Call Handling Tasking Procedures	
1014	Service managers and repair technicians use this standard procedure document to perform the step-by-step functions of a professional service call handling procedure and forms from a lead to sold repair customer checkout. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

Product ID 1015	<i>Proactive Service Agreement Sales Call Handling Tasking Procedures</i> Service managers and commercial Sales Reps use this standard procedure document to perform the step-by-step functions of a professional service agreement call handling step-by-step procedure from a lead to sold agreement. This document is provided in original MS Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95
Product ID 1018	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95

3. 1-hour part two:

- a. Proactive Service Agreement Trust-Selling Standard Procedures.
- b. Example: Commercial Service Agreement Long Form Maintenance Agreement.

c. Subscription provided or purchase these documents:

Product ID 1019	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
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4. 1-hour part three:

- a. Proactive Project/Design-Build Trust-Selling Standards Procedures.
- b. Example: Design-Build/Project Cover letter and Proposal Agreement.
- c. Creating a Project/Design-Build Statement of Qualifications.
- d. Example: Cover Letter and Statement of Qualifications.

e. Subscription provided or purchase these documents:

Product ID 1020	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different? (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during and after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
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Product ID 1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part one:

- f. Advantages of Work Delivery Tasking Standards.
- g. Business Functions are the Labor Tasking Activities That Must Occur.
- h. Service Repair Work Delivery Tasking Standard Procedures.
- i. **Subscription provided or purchase these documents:**

Product ID 1023	Service Repair Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to repair job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part two:

- a. Service Agreement Work Delivery Tasking Standard Procedures.
- b. Example: Commercial Service Agreement Cover letter and Proposal Agreement.
- c. **Subscription provided or purchase these documents:**

Product ID 1024	Service Agreement Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to service agreement job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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3. 1-hour part three:

- ee. Project/Design-Build Work Delivery Standards Procedures.
- a. **Subscription provided or purchase these documents:**

Product ID 1025	Project/Design-Build Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to Project/Design-Build agreement job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part four:

- ff. Equipment Start-up and Maintenance Tasking Standards.
- gg. Management Quality Assurance Standard Procedures.
- hh. Accounts Receivable and Payable Standard Procedures.

ii. Subscription provided or purchase these documents:

Product ID 1026	Equipment Start-up & Maintenance Tasking Procedures These documents are used by service managers, installation managers, technicians, installers, and operations managers. HVAC service companies use this equipment start-up, text, and verification tasking procedures to adhere to the new ASHRAE standard 180P standards. These tasking procedures help you establish the minimum HVAC inspection and maintenance requirements that preserve a system's ability to achieve optimum operations. AccuTask includes 136 start-up and maintenance tasking forms for 99.9% of HVAC equipment and systems. These documents are provided in original MS Word format to be printed on your local printer.	\$159.95
1027	Accounts Receivable and Payable Standard Procedures Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. Subscription provided or purchase these documents:

Product ID 1030	Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set A strong set of terms and conditions is critical. It circumvents any confusion about what you are selling and the transaction terms by which you make the offer. Your payment and liability terms and conditions agreement are both a social and a legal contract. Your terms and conditions establish how you do business in a socially acceptable manner. Still, it is also a legally binding contract between you and your clients.	\$99.95
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#7 How to Retain the Best People with Proven Employee Retention Strategies

1. 1-hour part one:

- a. Five Business Processes That Positively Affect Employee Retention.
- b. Implementing Step-by-Step Work Delivery Standard Procedures.
- c. **Subscription provided or purchase these documents:**
 - iv. N/A

2. 1-hour part two:

- a. Implement Performance-Based Job Descriptions.
- b. Implementing Labor Billable Efficiency & Productivity Monitoring.
- c. **Subscription provided or purchase these documents:**

Product ID 1032	<i>Performance Incentive plan - Office, Technicians & Installer</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1033	<i>Performance Incentive plan - Commercial Sales Rep</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1031	<i>Complete Set Performance-Based Job Descriptions</i> These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These documents are provided in MS Word format to be printed on your local printer. Set includes: <ul style="list-style-type: none"> • Dispatcher Job Description • Commercial Sales Rep Job Description • Service & Maintenance Technician Job Description • HVAC Installer Job Description • General Manager Job Description • Operations Manager job description • Sales Manager Job Description • Service Manager Job Description • Installation Manager Job Description • Human Resource Manager Job Description • Comptroller Job Description • Project Manager Job Description • Assistant Service Manager Job Description • HVAC Technician Instructor-Trainer Job Description • Lead Service & Maintenance Technician Job Description • Receptionist/Customer Care Specialist Job Description • Office Manager Job Description 	\$99.95

	<ul style="list-style-type: none"> • Accounts Payable Job Description • Accounts Receivable Job Description • Truck Driver/Warehouse Supervisor Job Description 	
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3. **1-hour part three:**

- d. Implement Performance Incentive Plans.
- e. Implementing a Company Culture of Success.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#8 How to Drive Profitability Using Key Performance Indicators

1. **1-hour:**

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.
- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
- g. **Subscription provided or purchase these documents:**
 - i. N/A

#9 How to Efficiently Organize the Business for Growth

1. **1-hour:**

- a. Why We Need to Organize Business into Groups.
- b. Commercial HVAC Business Organizational Structure.
- c. Five Logical Commercial Organizational Groups/Departments.
- d. Office Admin Department Functions & Organizational Structure.
- e. Sales Department Functions & Organizational Structure Service.
- f. Service Functions & Organizational Structure.
- g. Installation Department Functions & Organizational Structure.
- h. Construction Department Functions & Organizational Structure.
- i. **Subscription provided or purchase these documents:**

Product ID 1036	Commercial HVAC Service Contractor Organizational Charts Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company's book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all commercial HVAC companies should be organized in such a way as to compete competitively.	\$69.95
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#11 How to Forecast Your Monthly Spend Plan

1. 1-hour:

- Why You Need a Monthly Spend Plan Budget.
- Forecasting Labor Staffing Requirement by Work Category Procedure.
- Using BudgetPro to Develop Service Offerings Spend Plans.

d. Subscription provided or purchase these documents:

Product ID 1039	BudgetPro Annual & Monthly Budgeting Calculator One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	\$159.95
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#12 How to Recruit and Retain Top Performers

1. 1-hour part one:

- Proven Strategies to Help You Recruit the Best.
- Proven Strategies to Help You Retain the Best.
- Why Contractors are Making Bad Hiring Decisions.
- The Many Costs of Making a Bad Hire.
- Here are 9-Tips for Hiring the Right Candidate.
- Checklist for Hiring Employees.
- Checklist for Screening an Applicant Resume.

h. Subscription provided or purchase these documents:

i. N/A

2. 1-hour part two:

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.

e. Subscription provided or purchase these documents:

Product ID 1037	Employment Application This job or employment application is an official form given to applicants asking a wide range of questions both about the individual and their skills related to the job. Forms are legally defensible and stand as a way for applicants to introduce themselves to employers. Employees can be justifiably terminated for providing false information on this document that may be found post-hire. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1038	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#13 How to Select and Implement Field Management Software

2. 1-hour:

- a. Benefits of Field Service Management Software.
- b. Checklist for Selecting Field Service Management Software.
- c. **Subscription provided or purchase these documents:**
 - i. **N/A**

#14 How to Self-Develop Your Leadership and People Skills

2. 1-hour:

- a. Different Leadership Styles and When to Use Them.
- b. The Top Leadership Skills to Improve.
- c. Implement Your Leadership Skill Self-Development Plan.
- d. **Subscription provided or purchase these documents:**
 - ii. **N/A**

Service Manager Job Training Track

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

3. 1-hour part-one:

- a. Light-Commercial Upfront Repair Pricing Method.
- b. Time & Material Repair Pricing Method.
- c. **Subscription provided or purchase these documents:**

Product ID	Done-Right Flat-Rate Price Guide	
1001	<p>You can order the Done-Right HVAC or Plumbing or as an Electrical repair guide. Select one repair guide for only \$39.95 per month, select two repair guides for only \$69.95 per month, or select all three guides for only \$79.95 per month, a 12-month subscription. <i>Includes upload data for QuickBooks™ or for your field management software.</i></p> <p>Subscription consists of the following online training and resources:</p> <ul style="list-style-type: none">• Technician Fix-Right Flat Rate USER Instructions.• Professional service call handling process.• Technician Service Call Handling Soft Skills for Proper Customer Communications.	<i>\$39.95/M onth To \$79.95/M onth</i>

Product ID 1002	Technician/Installer Onsite Hourly Truck and Travel Costs & Pricing Calculator Program in MS Excel This document is used by service and replacement management to calculate the upfront per trip truck and travel rate for your upfront repair and replacement price guides. This document is provided in MS Excel format with results printed on your local printer.	\$69.95
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4. 1-hour part-two:

- a. Commercial HVAC Service Agreement Pricing Method.
- b. Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.
- c. Locking in Projected Repair Revenue Pricing Strategy Review.

d. Subscription provided or purchase these documents:

Product ID 1003	EasyPrice Service Agreement Sales Call Opportunity Assessment Form Mechanical rooms or central plant areas are logical starting points for multi-facility or multi-story facilities. Starting at the mechanical room or central plant gives the salesperson a better picture of how the conditioned air or water is distributed throughout the facility(s). Understanding how the HVAC/R system is distributed enables the salesperson to look for and ask pertinent questions related to system operating and maintenance tasking requirements.	\$99.95
1004	EasyPrice Service Agreement Estimating & Pricing Program MS Excel Service managers and commercial Sales Reps use this software to perform the step-by-step functions of a professional service agreement surveying, estimating, and pricing procedure. The benefit objective is to increase profitability by implementing a professional approach to accurately and efficiently gathering customer and scope of work job data, decreasing estimating human errors, reducing work-related risk liabilities, and by improving the customer's understanding how service agreement proposal development standardization increases efficiencies while reducing business risk to the company. Includes a complete set of 72-built-in equipment and filter estimating labor and material standards for packaged RTU, built-up systems, central plant heating/cooling, and associated equipment. This software tool is provided in original MS Excel format.	\$499.95

e. 1-hour part-three:

- f. Selecting Which Project Pricing Method to Use.
- g. Most Common - Single Divisor Project Pricing Method Review.
- h. EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement.
- i. Most Accurate – Project Dual Rate Overhead Project Pricing Method Review.
- j. Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.

k. Subscription provided or purchase these documents:

#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part three:

- a. Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- b. Technician Repair Call Check-in Opportunity Assessment Forms.
- c. Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. Subscription provided or purchase these documents:

Product ID 1011	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep: <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. • To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	\$99.95
Product ID 1012	Technician Repair Call Check-in Opportunity Assessment Form In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form	\$99.95
1013	Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled <i>System Condition Report</i> . This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended	\$99.95

	work that needs attention. When used with Microsoft Office and the obtained customer's email address or cell phone number, this form enables the contractor to continue post-call harvest opportunities that remain to need attention.	
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2. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
1018		
	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
1019		
	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different? (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during and after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1020		
	<i>Project/Design-Build Agreement Proposal Template</i> Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1021		
	<i>Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word</i> A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include:	\$99.95
1022		

	<ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	
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#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part one:

- d. Sales Objections Always Fall into 1 of 5 Categories.
- e. The 4-Step Consultative Trust Selling Approach.
- f. Proactive Repair Trust-Selling Standard Procedures.
- g. Proactive Service Agreement Trust-Selling Standard Procedures.
- h. Types of Commercial Service Agreement Inspection & Repair Coverages.
- i. Service Agreement Maintenance Options.
- j. Pros & Cons by Service Agreement Type of Coverage.

k. Subscription provided or purchase these documents:

Product ID 1014	<i>Proactive Repair Call Handling Tasking Procedures</i> Service managers and repair technicians use this standard procedure document to perform the step-by-step functions of a professional service call handling procedure and forms from a lead to sold repair customer checkout. This document is provided in original MS Word format to be printed on your local printer.	\$99.95
Product ID 1015	<i>Proactive Service Agreement Sales Call Handling Tasking Procedures</i> Service managers and commercial Sales Reps use this standard procedure document to perform the step-by-step functions of a professional service agreement call handling step-by-step procedure from a lead to sold agreement. This document is provided in original MS Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95
Product ID 1018	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95

5. 1-hour part two:

- a. Proactive Service Agreement Trust-Selling Standard Procedures.
- b. Example: Commercial Service Agreement Long Form Maintenance Agreement.
- c. **Subscription provided or purchase these documents:**

Product ID 1019	Commercial Service Agreement Short Form & Long Form Proposal Templates Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
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#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

3. 1-hour part one:

- d. Advantages of Work Delivery Tasking Standards.
- e. Business Functions are the Labor Tasking Activities That Must Occur.
- f. Service Repair Work Delivery Tasking Standard Procedures.

g. Subscription provided or purchase these documents:

Product ID 1023	Service Repair Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to repair job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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3. 1-hour part two:

- a. Service Agreement Work Delivery Tasking Standard Procedures.
- b. Example: Commercial Service Agreement Cover letter and Proposal Agreement.

c. Subscription provided or purchase these documents:

Product ID 1024	Service Agreement Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to service agreement job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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4. 1-hour part three:

- jj. Project/Design-Build Work Delivery Standards Procedures.

a. Subscription provided or purchase these documents:

Product ID 1025	Project/Design-Build Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to Project/Design-Build agreement job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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4. 1-hour part four:

- kk. Equipment Start-up and Maintenance Tasking Standards.
- ll. Management Quality Assurance Standard Procedures.
- mm. Accounts Receivable and Payable Standard Procedures.

nn. Subscription provided or purchase these documents:

Product ID 1026	Equipment Start-up & Maintenance Tasking Procedures These documents are used by service managers, installation managers, technicians, installers, and operations managers. HVAC service companies use this equipment start-up, text, and verification tasking procedures to adhere to the new ASHRAE standard 180P standards. These tasking procedures help you establish the minimum HVAC inspection and maintenance requirements that preserve a system's ability to achieve optimum operations. AccuTask includes 136 start-up and maintenance tasking forms for 99.9% of HVAC equipment and systems. These documents are provided in original MS Word format to be printed on your local printer.	\$159.95
1027	Accounts Receivable and Payable Standard Procedures Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

5. 1-hour part five:

- oo. Inventory & Tool Control Standards Procedures.
- pp. Customer Care Call Handling Standard Procedures.
- qq. Customer Billing Standards.

rr. Subscription provided or purchase these documents:

Product ID 1028	Inventory and Tool Control Standards Includes step-by-step company job and truck inventory control standards. General managers, service managers, and operations managers use them. This document is provided in original MS Word format to be printed on your local printer..	\$99.95
1029	Effective Customer Care Call Handling Standard Procedures Arming the dispatcher with a professional standardized way to greet and respond to customer inquiries to include: <ul style="list-style-type: none"> • Greeting the Customer • Identify How Customer Will Pay for Today's Work • Informing the Customer of Response Time: • Identifying the Lead Source • Reminding the Customer of What Happens Next • Calling the Customer to Confirm Arrival Time • Calling to Reschedule Appointment • If a Solution Requires a Plan • Callback With a Plan 	\$99.95

6. 1-hour part six:

- ss. Field Labor Productivity Optimization Standards.
- tt. Service Reporting Standard Procedures.

uu. **Subscription provided or purchase these documents:**

i. N/A

#6 How to Protect the Business with Proper Terms & Conditions

1. **1-hour:**

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. **Subscription provided or purchase these documents:**

Product ID	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i>	
1030	A strong set of terms and conditions is critical. It circumvents any confusion about what you are selling and the transaction terms by which you make the offer. Your payment and liability terms and conditions agreement are both a social and a legal contract. Your terms and conditions establish how you do business in a socially acceptable manner. Still, it is also a legally binding contract between you and your clients.	\$99.95

#7 How to Retain the Best People with Proven Employee Retention Strategies

1. **1-hour part one:**

- a. Five Business Processes That Positively Affect Employee Retention.
- b. Implementing Step-by-Step Work Delivery Standard Procedures.
- c. **Subscription provided or purchase these documents:**

v. N/A

2. **1-hour part two:**

- a. Implement Performance-Based Job Descriptions.
- b. Implementing Labor Billable Efficiency & Productivity Monitoring.

c. **Subscription provided or purchase these documents:**

Product ID	<i>Performance Incentive plan - Office, Technicians & Installer</i>	
1032	Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1033	<i>Performance Incentive plan - Commercial Sales Rep</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

Product ID	Complete Set Performance-Based Job Descriptions These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These documents are provided in MS Word format to be printed on your local printer. Set includes:	
1031	<ul style="list-style-type: none"> • Dispatcher Job Description • Commercial Sales Rep Job Description • Service & Maintenance Technician Job Description • HVAC Installer Job Description • General Manager Job Description • Operations Manager job description • Sales Manager Job Description • Service Manager Job Description • Installation Manager Job Description • Human Resource Manager Job Description • Comptroller Job Description • Project Manager Job Description • Assistant Service Manager Job Description • HVAC Technician Instructor-Trainer Job Description • Lead Service & Maintenance Technician Job Description • Receptionist/Customer Care Specialist Job Description • Office Manager Job Description • Accounts Payable Job Description • Accounts Receivable Job Description • Truck Driver/Warehouse Supervisor Job Description 	\$99.95

3. **1-hour part three:**

- d. Implement Performance Incentive Plans.
- e. Implementing a Company Culture of Success.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#8 How to Drive Profitability Using Key Performance Indicators

1. **1-hour:**

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.
- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
- g. **Subscription provided or purchase these documents:**
 - i. N/A

#9 How to Efficiently Organize the Business for Growth

2. 1-hour:

- a. Why We Need to Organize Business into Groups.
- b. Commercial HVAC Business Organizational Structure.
- c. Five Logical Commercial Organizational Groups/Departments.
- d. Office Admin Department Functions & Organizational Structure.
- e. Sales Department Functions & Organizational Structure Service.
- f. Service Functions & Organizational Structure.
- g. Installation Department Functions & Organizational Structure.
- h. Construction Department Functions & Organizational Structure.

i. Subscription provided or purchase these documents:

Product ID	Commercial HVAC Service Contractor Organizational Charts	
1036	Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company's book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all commercial HVAC companies should be organized in such a way as to compete competitively.	\$69.95

#10 How to Implement Proper Customer Care Call Handling Procedures

2. 1-hour:

- a. Importance of Good Customer Care.
- b. Customer Care Inbound and Outbound Call Handling Script.
- c. Crucial Hiring Criteria for the Customer Care & Dispatcher Function.
- d. Organizing an Office Central Filing System.
- e. Implement Hiring Guidelines for the Customer Care/Dispatch Function.
- f. Customer Service 101: Proper Phone Etiquette.
- g. Implement Training for the Customer Care/Dispatch Function.

h. Subscription provided or purchase these documents:

Product ID	Customer Care Call Handling Inbound and Outbound Script	
1034	This script includes a professional standardized way to greet and responds to the customer inquiries. The script includes greeting the customer, identifying if they are interested in a service agreement, annual service agreement renewal reminder, identifying how the customer they pay for today's work, informing the customer of response time, identifying the lead	\$69.95

	source, calling the customer to confirm arrival time, managing the price of today's service, calling to reschedule an appointment, handling upset callers. This document is provided in original MS Word format to be printed on your local printer.	
1035	<i>Customer Care Response for "Price is Too High" Objection</i> Used by customer care, receptionist, and dispatchers. This document is designed to inform employees and your customers why we price our services, justifying the price to the customer post service. Includes a professional standardized way to respond to a price objection via letter or email. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#11 How to Forecast Your Monthly Spend Plan

2. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.

d. Subscription provided or purchase these documents:

Product ID	<i>BudgetPro Annual & Monthly Budgeting Calculator</i>	
1039	One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	\$159.95

#12 How to Recruit and Retain Top Performers

3. 1-hour part one:

- a. Proven Strategies to Help You Recruit the Best.
- b. Proven Strategies to Help You Retain the Best.
- c. Why Contractors are Making Bad Hiring Decisions.
- d. The Many Costs of Making a Bad Hire.
- e. Here are 9-Tips for Hiring the Right Candidate.
- f. Checklist for Hiring Employees.
- g. Checklist for Screening an Applicant Resume.

h. Subscription provided or purchase these documents:

i. N/A

4. 1-hour part two:

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.

e. Subscription provided or purchase these documents:

Product ID 1037	Employment Application This job or employment application is an official form given to applicants asking a wide range of questions both about the individual and their skills related to the job. Forms are legally defensible and stand as a way for applicants to introduce themselves to employers. Employees can be justifiably terminated for providing false information on this document that may be found post-hire. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1038	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#13 How to Select and Implement Field Management Software

3. 1-hour:

- a. Benefits of Field Service Management Software.
- b. Checklist for Selecting Field Service Management Software.
- c. **Subscription provided or purchase these documents:**
 - i. **N/A**

#14 How to Self-Develop Your Leadership and People Skills

3. 1-hour:

- a. Different Leadership Styles and When to Use Them.
- b. The Top Leadership Skills to Improve.
- c. Implement Your Leadership Skill Self-Development Plan.
- d. **Subscription provided or purchase these documents:**
 - ii. **N/A**

Dispatcher/Customer Care Manager Job Training Track

Pilot - How to Master a Thriving Commercial HVAC Service Business

2. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part one:

- h. Advantages of Work Delivery Tasking Standards.
- i. Business Functions are the Labor Tasking Activities That Must Occur.
- j. Service Repair Work Delivery Tasking Standard Procedures.
- k. **Subscription provided or purchase these documents:**

Product ID 1023	<i>Service Repair Work Delivery Standard Procedures</i> Includes step-by-step work delivery tasking standards from a lead to repair job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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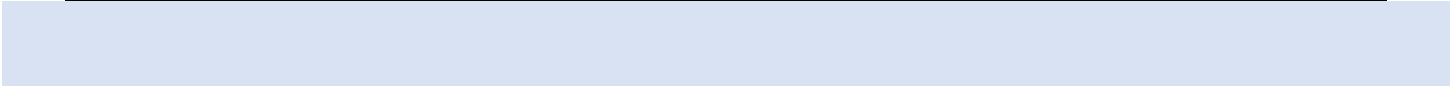
#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.
- e. **Subscription provided or purchase these documents:**

Product ID 1030	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i> A strong set of terms and conditions is critical. It circumvents any confusion about what you are selling and the transaction terms by which you make the offer. Your payment and liability terms and conditions agreement are both a	\$99.95
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	social and a legal contract. Your terms and conditions establish how you do business in a socially acceptable manner. Still, it is also a legally binding contract between you and your clients.	
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Installation/Construction Manager Job Training Track

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-three:

- a. Selecting Which Project Pricing Method to Use.
- b. Most Common - Single Divisor Project Pricing Method Review.
- c. EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement.
- d. Most Accurate – Project Dual Rate Overhead Project Pricing Method Review.
- e. Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.
- f. **Subscription provided or purchase these documents:**

Product ID	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep: <ul style="list-style-type: none">• To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements.• To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost.• To provide the means to project a professional image.• Systematically gather customer & technical info.• To provide the means to demonstrate performance via your best practice project installation approach.	<i>\$99.95</i>
1005		

	<ul style="list-style-type: none"> • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. • To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	
Product ID 1012	Technician Repair Call Check-in Opportunity Assessment Form In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form	\$99.95
1013	Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled System Condition Report . This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. When used with Microsoft Office and the obtained customer's email address or cell phone number, this form enables the contractor to continue post-call harvest opportunities that remain to need attention.	\$99.95

2. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID 1018	Service Agreement Sales First Call Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service	\$99.95
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	agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	
1019	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
1020	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different? (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during and after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1021	<i>Project/Design-Build Agreement Proposal Template</i> Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	<i>Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word</i> A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part three:

- Proactive Project/Design-Build Trust-Selling Standards Procedures.
- Example: Design-Build/Project Cover letter and Proposal Agreement.
- Creating a Project/Design-Build Statement of Qualifications.
- Example: Cover Letter and Statement of Qualifications.

e. Subscription provided or purchase these documents:

Product ID 1020	Project/Design-Build Sales First Call Sales Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for project bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different? (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during and after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
Product ID 1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part one:

- f. Advantages of Work Delivery Tasking Standards.
- g. Business Functions are the Labor Tasking Activities That Must Occur.
- h. Service Repair Work Delivery Tasking Standard Procedures.
- i. **Subscription provided or purchase these documents:**

Product ID 1023	Service Repair Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to repair job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part four:

- vv. Equipment Start-up and Maintenance Tasking Standards.
- ww. Management Quality Assurance Standard Procedures.
- xx. Accounts Receivable and Payable Standard Procedures.
- yy. **Subscription provided or purchase these documents:**

Product ID	Equipment Start-up & Maintenance Tasking Procedures	
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1026	These documents are used by service managers, installation managers, technicians, installers, and operations managers. HVAC service companies use this equipment start-up, text, and verification tasking procedures to adhere to the new ASHRAE standard 180P standards. These tasking procedures help you establish the minimum HVAC inspection and maintenance requirements that preserve a system's ability to achieve optimum operations. AccuTask includes 136 start-up and maintenance tasking forms for 99.9% of HVAC equipment and systems. These documents are provided in original MS Word format to be printed on your local printer.	\$159.95
1027	<i>Accounts Receivable and Payable Standard Procedures</i> Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

3. 1-hour part five:

zz. Inventory & Tool Control Standards Procedures.

aaa. Customer Care Call Handling Standard Procedures.

bbb. Customer Billing Standards.

ccc. **Subscription provided or purchase these documents:**

Product ID 1028	<i>Inventory and Tool Control Standards</i> Includes step-by-step company job and truck inventory control standards. General managers, service managers, and operations managers use them. This document is provided in original MS Word format to be printed on your local printer..	\$99.95
Product ID 1029	<i>Effective Customer Care Call Handling Standard Procedures</i> Arming the dispatcher with a professional standardized way to greet and respond to customer inquiries to include: <ul style="list-style-type: none"> • Greeting the Customer • Identify How Customer Will Pay for Today's Work • Informing the Customer of Response Time: • Identifying the Lead Source • Reminding the Customer of What Happens Next • Calling the Customer to Confirm Arrival Time • Calling to Reschedule Appointment • If a Solution Requires a Plan • Callback With a Plan 	\$99.95

4. 1-hour part six:

ddd. Field Labor Productivity Optimization Standards.

eee. Service Reporting Standard Procedures.

fff. **Subscription provided or purchase these documents:**

i. N/A

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. Subscription provided or purchase these documents:

Product ID	Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set	
1030	A strong set of terms and conditions is critical. It circumvents any confusion about what you are selling and the transaction terms by which you make the offer. Your payment and liability terms and conditions agreement are both a social and a legal contract. Your terms and conditions establish how you do business in a socially acceptable manner. Still, it is also a legally binding contract between you and your clients.	\$99.95

#7 How to Retain the Best People with Proven Employee Retention Strategies

1. 1-hour part one:

- a. Five Business Processes That Positively Affect Employee Retention.
- b. Implementing Step-by-Step Work Delivery Standard Procedures.
- c. **Subscription provided or purchase these documents:**

vi. N/A

2. 1-hour part two:

- a. Implement Performance-Based Job Descriptions.
- b. Implementing Labor Billable Efficiency & Productivity Monitoring.

c. Subscription provided or purchase these documents:

Product ID	Performance Incentive plan - Office, Technicians & Installer	
1032	Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1033	Performance Incentive plan - Commercial Sales Rep Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
	Complete Set Performance-Based Job Descriptions These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These	

1031	<p>documents are provided in MS Word format to be printed on your local printer. Set includes:</p> <ul style="list-style-type: none"> • Dispatcher Job Description • Commercial Sales Rep Job Description • Service & Maintenance Technician Job Description • HVAC Installer Job Description • General Manager Job Description • Operations Manager job description • Sales Manager Job Description • Service Manager Job Description • Installation Manager Job Description • Human Resource Manager Job Description • Comptroller Job Description • Project Manager Job Description • Assistant Service Manager Job Description • HVAC Technician Instructor-Trainer Job Description • Lead Service & Maintenance Technician Job Description • Receptionist/Customer Care Specialist Job Description • Office Manager Job Description • Accounts Payable Job Description • Accounts Receivable Job Description • Truck Driver/Warehouse Supervisor Job Description 	\$99.95
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3. **1-hour part three:**

- d. Implement Performance Incentive Plans.
- e. Implementing a Company Culture of Success.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#8 How to Drive Profitability Using Key Performance Indicators

1. **1-hour:**

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.
- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
- g. **Subscription provided or purchase these documents:**
 - i. N/A

#9 How to Efficiently Organize the Business for Growth

1. **1-hour:**

- a. Why We Need to Organize Business into Groups.
- b. Commercial HVAC Business Organizational Structure.
- c. Five Logical Commercial Organizational Groups/Departments.
- d. Office Admin Department Functions & Organizational Structure.
- e. Sales Department Functions & Organizational Structure Service.
- f. Service Functions & Organizational Structure.
- g. Installation Department Functions & Organizational Structure.
- h. Construction Department Functions & Organizational Structure.
- i. **Subscription provided or purchase these documents:**

Product ID	<i>Commercial HVAC Service Contractor Organizational Charts</i>	
1036	Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company's book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all commercial HVAC companies should be organized in such a way as to compete competitively.	\$69.95

#11 How to Forecast Your Monthly Spend Plan

1. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.
- d. **Subscription provided or purchase these documents:**

Product ID	<i>BudgetPro Annual & Monthly Budgeting Calculator</i>	
1039	One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	\$159.95

#12 How to Recruit and Retain Top Performers

1. 1-hour part one:

- a. Proven Strategies to Help You Recruit the Best.
- b. Proven Strategies to Help You Retain the Best.
- c. Why Contractors are Making Bad Hiring Decisions.
- d. The Many Costs of Making a Bad Hire.
- e. Here are 9-Tips for Hiring the Right Candidate.
- f. Checklist for Hiring Employees.
- g. Checklist for Screening an Applicant Resume.
- h. **Subscription provided or purchase these documents:**
 - i. N/A

2. 1-hour part two:

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.
- e. **Subscription provided or purchase these documents:**

Product ID 1037	Employment Application This job or employment application is an official form given to applicants asking a wide range of questions both about the individual and their skills related to the job. Forms are legally defensible and stand as a way for applicants to introduce themselves to employers. Employees can be justifiably terminated for providing false information on this document that may be found post-hire. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1038	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#13 How to Select and Implement Field Management Software

4. 1-hour:

- a. Benefits of Field Service Management Software.
- b. Checklist for Selecting Field Service Management Software.
- c. **Subscription provided or purchase these documents:**
 - i. N/A

#14 How to Self-Develop Your Leadership and People Skills

4. 1-hour:

- a. Different Leadership Styles and When to Use Them.
- b. The Top Leadership Skills to Improve.
- c. Implement Your Leadership Skill Self-Development Plan.
- d. **Subscription provided or purchase these documents:**
 - ii. N/A

Project/Design-Build Estimator

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-three:

- a. Selecting Which Project Pricing Method to Use.
- b. Most Common - Single Divisor Project Pricing Method Review.
- c. EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement.
- d. Most Accurate – Project Dual Rate Overhead Project Pricing Method Review.
- e. Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.
- f. **Subscription provided or purchase these documents:**

Product ID	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep: <ul style="list-style-type: none">• To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements.• To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost.• To provide the means to project a professional image.• Systematically gather customer & technical info.• To provide the means to demonstrate performance via your best practice project installation approach.• To educate and move the customer from the lowest cost option to the BEST option. To provide the means to complete the sales call and close the transaction in 2 sales calls or less.	
1005		\$99.95

1006	<p><i>EasyPrice Commercial/Industrial Project Single Divisor Pricing Calculator MS Excel</i></p> <p>When setting service pricing for your HVAC business, you need to understand that there are two types of business costs - direct and indirect or overhead costs. Direct costs are the cost of goods sold required to deliver work from a lead to job closeout. It includes parts, equipment, materials, ductwork, permits, labor, and vehicle expenses. Business owners typically price their work where most projects represent 60% or higher in equipment, materials, and subs. On the other hand, the indirect or overhead cost keeps the lights on and sustainable. Your overhead costs include your mortgage/lease/rent, utility expenses, admin and sales salary, uniforms, employee training, and trash removal. You need an accurate pricing method to compete on large or multi-phase jobs. The single divisor pricing method uses an average overhead recovery which can overprice a job.</p>	\$99.95
1007	<p><i>EasyPrice Dual Rate Overhead Project Pricing Calculator MS Excel</i></p> <p>This job pricing method utilizes two overhead rates for subcontractors, equipment, and materials and one for direct labor. The main reason to use this method is that overhead is more accurately distributed based on the percentage of install labor to non-labor and materials direct costs on a job. Overhead is allocated higher for projects with a large proportion of the job is installation labor versus equipment, materials, and subcontracts. Overheads are less where installation labor is small than non-labor and direct material costs.</p>	\$99.95

#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part three:

- Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- Technician Repair Call Check-in Opportunity Assessment Forms.
- Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. Subscription provided or purchase these documents:

Product ID	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i>	
1011	<p>This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep:</p> <ul style="list-style-type: none"> To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. To provide the means to project a professional image. Systematically gather customer & technical info. To provide the means to demonstrate performance via your best practice project installation approach. 	\$99.95

	<ul style="list-style-type: none"> To educate and move the customer from the lowest cost option to the BEST option. To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	
Product ID 1012	Technician Repair Call Check-in Opportunity Assessment Form In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form	\$99.95
1013	Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled System Condition Report . This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. When used with Microsoft Office and the obtained customer's email address or cell phone number, this form enables the contractor to continue post-call harvest opportunities that remain to need attention.	\$99.95

2. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID 1018	Service Agreement Sales First Call Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
	Commercial Service Agreement Short Form & Long Form Proposal Templates	

1019	Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
1020	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different? (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during and after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1021	<i>Project/Design-Build Agreement Proposal Template</i> Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	<i>Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word</i> A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

2. 1-hour part three:

- Proactive Project/Design-Build Trust-Selling Standards Procedures.
- Example: Design-Build/Project Cover letter and Proposal Agreement.
- Creating a Project/Design-Build Statement of Qualifications.
- Example: Cover Letter and Statement of Qualifications.

e. Subscription provided or purchase these documents:

Product ID 1020	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different? (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during and after post-service agreement	\$99.95
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	execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	
Product ID 1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part four:

- ggg. Equipment Start-up and Maintenance Tasking Standards.
- hhh. Management Quality Assurance Standard Procedures.
- iii. Accounts Receivable and Payable Standard Procedures.

jjj. Subscription provided or purchase these documents:

Product ID 1026	Equipment Start-up & Maintenance Tasking Procedures These documents are used by service managers, installation managers, technicians, installers, and operations managers. HVAC service companies use this equipment start-up, text, and verification tasking procedures to adhere to the new ASHRAE standard 180P standards. These tasking procedures help you establish the minimum HVAC inspection and maintenance requirements that preserve a system's ability to achieve optimum operations. AccuTask includes 136 start-up and maintenance tasking forms for 99.9% of HVAC equipment and systems. These documents are provided in original MS Word format to be printed on your local printer.	\$159.95
1027	Accounts Receivable and Payable Standard Procedures Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.

- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.
- e. Subscription provided or purchase these documents:**

Product ID	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i>	
1030	A strong set of terms and conditions is critical. It circumvents any confusion about what you are selling and the transaction terms by which you make the offer. Your payment and liability terms and conditions agreement are both a social and a legal contract. Your terms and conditions establish how you do business in a socially acceptable manner. Still, it is also a legally binding contract between you and your clients.	\$99.95

Commercial Service Agreement Sales Rep Job Training Track

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-two:

- a. Commercial HVAC Service Agreement Pricing Method.
- b. Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.
- c. Locking in Projected Repair Revenue Pricing Strategy Review.
- d. **Subscription provided or purchase these documents:**

Product ID 1003	EasyPrice Service Agreement Sales Call Opportunity Assessment Form Mechanical rooms or central plant areas are logical starting points for multi-facility or multi-story facilities. Starting at the mechanical room or central plant gives the salesperson a better picture of how the conditioned air or water is distributed throughout the facility(s). Understanding how the HVAC/R system is distributed enables the salesperson to look for and ask pertinent questions related to system operating and maintenance tasking requirements.	\$99.95
1004	EasyPrice Service Agreement Estimating & Pricing Program MS Excel Service managers and commercial Sales Reps use this software to perform the step-by-step functions of a professional service agreement surveying, estimating, and pricing procedure. The benefit objective is to increase profitability by implementing a professional approach to accurately and efficiently gathering customer and scope of work job data, decreasing estimating human errors, reducing work-related risk liabilities, and by improving the customer's understanding how service agreement proposal development standardization increases efficiencies while reducing business risk to the company. Includes a complete set of 72-built-in equipment and filter estimating labor and material standards for packaged	\$499.95

	RTU, built-up systems, central plant heating/cooling, and associated equipment. This software tool is provided in original MS Excel format.	
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2. 1-hour part-three:

- a. Selecting Which Project Pricing Method to Use.
- b. Most Common - Single Divisor Project Pricing Method Review.
- c. EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement.
- d. Most Accurate – Project Dual Rate Overhead Project Pricing Method Review.
- e. Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.

f. Subscription provided or purchase these documents:

Product ID	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep: <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. To provide the means to complete the sales call and close the transaction in 2 sales calls or less.	\$99.95
1005		
	<i>EasyPrice Commercial/Industrial Project Single Divisor Pricing Calculator MS Excel</i> When setting service pricing for your HVAC business, you need to understand that there are two types of business costs - direct and indirect or overhead costs. Direct costs are the cost of goods sold required to deliver work from a lead to job closeout. It includes parts, equipment, materials, ductwork, permits, labor, and vehicle expenses. Business owners typically price their work where most projects represent 60% or higher in equipment, materials, and subs. On the other hand, the indirect or overhead cost keeps the lights on and sustainable. Your overhead costs include your mortgage/lease/rent, utility expenses, admin and sales salary, uniforms, employee training, and trash removal. You need an accurate pricing method to compete on large or multi-	\$99.95
1006		

	phase jobs. The single divisor pricing method uses an average overhead recovery which can overprice a job.	
Product ID 1007	<i>EasyPrice Dual Rate Overhead Project Pricing Calculator MS Excel</i> This job pricing method utilizes two overhead rates for subcontractors, equipment, and materials and one for direct labor. The main reason to use this method is that overhead is more accurately distributed based on the percentage of install labor to non-labor and materials direct costs on a job. Overhead is allocated higher for projects with a large proportion of the job is installation labor versus equipment, materials, and subcontracts. Overheads are less where installation labor is small than non-labor and direct material costs.	\$99.95

#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part one:

- a. Segmenting Commercial HVAC Markets is More Effective than Generic Marketing.
- b. Medium and Large Government Building Buyer Profile & Sales Positioning.
- c. Commercial Building Buyer Profile & Sales Positioning.
- d. Industrial Building Buyer Profile & Sales Positioning.
- e. College/University Building Buyer Profile & Sales Positioning.
- f. Healthcare Building Buyer Profile & Sales Positioning.
- g. Understanding Building Owner/Operator Roles & Responsibilities.
- h. **Subscription provided or purchase these documents:**

Product ID 2007	<i>Receive the industry Profiles and Understanding Building Owner/Operator Roles & Responsibilities profiles in MS Word</i> This document provides you with all industry profiles as well as the buyer job responsibilities and duties profile as shown in course and enables you to add other industries or update the provided industry and client buyer job description profiles.	\$99.95
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2. 1-hour part two:

- a. An Effective Step-by-Step Commercial Lead Generation Strategy and Tactical Plan.
- b. Overcome Common Commercial HVAC Sales Objections.
- c. The 10 Commandments of Time Management.
- d. Organization Option for Implementing Commercial Lead Generation.
- e. **Subscription provided or purchase these documents:**

Product ID 1008	<i>Commercial HVAC Contractor Introduction Letter & Line Card Templates</i> You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM &	\$99.95
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	Customized letter & line Card to better Position the company as an industry HVAC expert.	
Product ID 1009	<p><i>Commercial Lead Generation Outbound Sales Call Script</i></p> <p>Lead generation is about building your customer base by retaining and adding new customers. Lead generation is an essential business process to consistently acquire new commercial business through the design, production, and direct marketing tasking efforts within your sales area. Marketing is the same thing as lead generation, which is the process of systematic customer awareness communications. The process involves using a 12-step lead generation implementation plan:</p> <ul style="list-style-type: none"> 37. Identify capabilities as derived by you and your staff's experience and expertise. 38. Identify packages of offerings based on your staff capabilities. 39. Identify target markets that fit your capabilities. 40. Obtain a target commercial business list of owner-occupied industries. 41. Import into a contact management program (e.g., Outlook). 42. Set specific weekly goals for the number of prospects contacted, called, mailed & follow-up. 43. Set specific weekly new business appointments. 44. Clean target group list with decision makers names. 45. Mail introduction letter and line card. 46. Follow-up to identify client scope of work and develop proposals. 47. Set an appointment to present and close the business. 48. Reporting lead generation performance to a business development plan. 	\$99.95
Product ID 1010	<p><i>Performance Tasking & Quota Tracking & Reporting in MS Excel</i></p> <p>To report Actual Sales Tasking Plan to Quota Performance for:</p> <ul style="list-style-type: none"> • Sales Tasking Quotas - It is the Sales Manager identifies that sets Sales Rep tasking plan quotas for service agreements and jobs by individual Sales Reps. • Demand Service Performance Measurement - At the end of each day/week, the Sales Rep's total actual new account Demand Service and total sold to date are tracked by Service Manager and reported to the Sales Rep and the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Service Agreement Performance Measurement - At the end of each day/week, the Sales Rep's total actual Service Agreements and total Service Agreements sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Project Performance Measurement - At the end of each day/week, the Sales Rep's total actual Projects and total Projects sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales 	\$99.95

	Manager.	
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3. 1-hour part three:

- a. Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- b. Technician Repair Call Check-in Opportunity Assessment Forms.
- c. Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. Subscription provided or purchase these documents:

Product ID 1011	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep: <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. • To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	\$99.95
Product ID 1012	Technician Repair Call Check-in Opportunity Assessment Form In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form	\$99.95
1013	Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled <i>System Condition Report</i> . This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager	\$99.95

	for pricing work and following up with the customer on the recommended work that needs attention. When used with Microsoft Office and the obtained customer's email address or cell phone number, this form enables the contractor to continue post-call harvest opportunities that remain to need attention.	
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4. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
1018		
	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
1019		
	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different? (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during and after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1020		
	<i>Project/Design-Build Agreement Proposal Template</i> Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1021		
	<i>Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word</i> A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications	\$99.95
1022		

	<p>tailored to the requirements of the commercial project you are bidding. It should include:</p> <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	
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#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part one:

- d. Sales Objections Always Fall into 1 of 5 Categories.
- e. The 4-Step Consultative Trust Selling Approach.
- f. Proactive Repair Trust-Selling Standard Procedures.
- g. Proactive Service Agreement Trust-Selling Standard Procedures.
- h. Types of Commercial Service Agreement Inspection & Repair Coverages.
- i. Service Agreement Maintenance Options.
- j. Pros & Cons by Service Agreement Type of Coverage.

k. Subscription provided or purchase these documents:

Product ID 1014	<i>Proactive Repair Call Handling Tasking Procedures</i> Service managers and repair technicians use this standard procedure document to perform the step-by-step functions of a professional service call handling procedure and forms from a lead to sold repair customer checkout. This document is provided in original MS Word format to be printed on your local printer.	\$99.95
Product ID 1015	<i>Proactive Service Agreement Sales Call Handling Tasking Procedures</i> Service managers and commercial Sales Reps use this standard procedure document to perform the step-by-step functions of a professional service agreement call handling step-by-step procedure from a lead to sold agreement. This document is provided in original MS Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95
Product ID 1018	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95

2. 1-hour part two:

- a. Proactive Service Agreement Trust-Selling Standard Procedures.
- b. Example: Commercial Service Agreement Long Form Maintenance Agreement.

c. Subscription provided or purchase these documents:

Product ID 1019	Commercial Service Agreement Short Form & Long Form Proposal Templates Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
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#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part two:

- a. Service Agreement Work Delivery Tasking Standard Procedures.
- b. Example: Commercial Service Agreement Cover letter and Proposal Agreement.

c. Subscription provided or purchase these documents:

Product ID 1024	Service Agreement Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to service agreement job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part four:

- kkk. Equipment Start-up and Maintenance Tasking Standards.
- lll. Management Quality Assurance Standard Procedures.
- mmm. Accounts Receivable and Payable Standard Procedures.

nnn. Subscription provided or purchase these documents:

Product ID 1026	Equipment Start-up & Maintenance Tasking Procedures These documents are used by service managers, installation managers, technicians, installers, and operations managers. HVAC service companies use this equipment start-up, text, and verification tasking procedures to adhere to the new ASHRAE standard 180P standards. These tasking procedures help you establish the minimum HVAC inspection and maintenance requirements that preserve a system's ability to achieve optimum operations. AccuTask includes 136 start-up and maintenance tasking forms for 99.9% of HVAC equipment and systems. These documents are provided in original MS Word format to be printed on your local printer.	\$159.95
1027	Accounts Receivable and Payable Standard Procedures Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.

- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. Subscription provided or purchase these documents:

Product ID	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i>	
1030	A strong set of terms and conditions is critical. It circumvents any confusion about what you are selling and the transaction terms by which you make the offer. Your payment and liability terms and conditions agreement are both a social and a legal contract. Your terms and conditions establish how you do business in a socially acceptable manner. Still, it is also a legally binding contract between you and your clients.	\$99.95

Commercial Project/Design-Build Sales Rep Job Training Track

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-two:

- a. Commercial HVAC Service Agreement Pricing Method.
- b. Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.
- c. Locking in Projected Repair Revenue Pricing Strategy Review.
- d. **Subscription provided or purchase these documents:**

Product ID 1003	EasyPrice Service Agreement Sales Call Opportunity Assessment Form Mechanical rooms or central plant areas are logical starting points for multi-facility or multi-story facilities. Starting at the mechanical room or central plant gives the salesperson a better picture of how the conditioned air or water is distributed throughout the facility(s). Understanding how the HVAC/R system is distributed enables the salesperson to look for and ask pertinent questions related to system operating and maintenance tasking requirements.	\$99.95
1004	EasyPrice Service Agreement Estimating & Pricing Program MS Excel Service managers and commercial Sales Reps use this software to perform the step-by-step functions of a professional service agreement surveying, estimating, and pricing procedure. The benefit objective is to increase profitability by implementing a professional approach to accurately and efficiently gathering customer and scope of work job data, decreasing estimating human errors, reducing work-related risk liabilities, and by improving the customer's understanding how service agreement proposal development standardization increases efficiencies while reducing business risk to the company. Includes a complete set of 72-built-in	\$499.95

	equipment and filter estimating labor and material standards for packaged RTU, built-up systems, central plant heating/cooling, and associated equipment. This software tool is provided in original MS Excel format.	
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2. 1-hour part-three:

- a. Selecting Which Project Pricing Method to Use.
- b. Most Common - Single Divisor Project Pricing Method Review.
- c. EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement.
- d. Most Accurate – Project Dual Rate Overhead Project Pricing Method Review.
- e. Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.

f. Subscription provided or purchase these documents:

Product ID 1005	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep: <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. To provide the means to complete the sales call and close the transaction in 2 sales calls or less.	\$99.95
1006	<i>EasyPrice Commercial/Industrial Project Single Divisor Pricing Calculator MS Excel</i> When setting service pricing for your HVAC business, you need to understand that there are two types of business costs - direct and indirect or overhead costs. Direct costs are the cost of goods sold required to deliver work from a lead to job closeout. It includes parts, equipment, materials, ductwork, permits, labor, and vehicle expenses. Business owners typically price their work where most projects represent 60% or higher in equipment, materials, and subs. On the other hand, the indirect or overhead cost keeps the lights on and sustainable. Your overhead costs include your mortgage/lease/rent, utility expenses, admin and sales salary, uniforms, employee training, and trash removal. You need an accurate pricing method to compete on large or multi-	\$99.95

	phase jobs. The single divisor pricing method uses an average overhead recovery which can overprice a job.	
1007	<p><i>EasyPrice Dual Rate Overhead Project Pricing Calculator MS Excel</i></p> <p>This job pricing method utilizes two overhead rates for subcontractors, equipment, and materials and one for direct labor. The main reason to use this method is that overhead is more accurately distributed based on the percentage of install labor to non-labor and materials direct costs on a job.</p> <p>Overhead is allocated higher for projects with a large proportion of the job is installation labor versus equipment, materials, and subcontracts. Overheads are less where installation labor is small than non-labor and direct material costs.</p>	\$99.95

#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part one:

- a. Segmenting Commercial HVAC Markets is More Effective than Generic Marketing.
- b. Medium and Large Government Building Buyer Profile & Sales Positioning.
- c. Commercial Building Buyer Profile & Sales Positioning.
- d. Industrial Building Buyer Profile & Sales Positioning.
- e. College/University Building Buyer Profile & Sales Positioning.
- f. Healthcare Building Buyer Profile & Sales Positioning.
- g. Understanding Building Owner/Operator Roles & Responsibilities.
- h. **Subscription provided or purchase these documents:**

Product ID 2007	<p><i>Receive the industry Profiles and Understanding Building Owner/Operator Roles & Responsibilities profiles in MS Word</i></p> <p>This document provides you with all industry profiles as well as the buyer job responsibilities and duties profile as shown in course and enables you to add other industries or update the provided industry and client buyer job description profiles.</p>	\$99.95
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2. 1-hour part two:

- a. An Effective Step-by-Step Commercial Lead Generation Strategy and Tactical Plan.
- b. Overcome Common Commercial HVAC Sales Objections.
- c. The 10 Commandments of Time Management.
- d. Organization Option for Implementing Commercial Lead Generation.
- e. **Subscription provided or purchase these documents:**

Product ID 1008	Commercial HVAC Contractor Introduction Letter & Line Card Templates You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM & Customized letter & line Card to better Position the company as an industry HVAC expert.	\$99.95
1009	Commercial Lead Generation Outbound Sales Call Script Lead generation is about building your customer base by retaining and adding new customers. Lead generation is an essential business process to consistently acquire new commercial business through the design, production, and direct marketing tasking efforts within your sales area. Marketing is the same thing as lead generation, which is the process of systematic customer awareness communications. The process involves using a 12-step lead generation implementation plan: 49. Identify capabilities as derived by you and your staff's experience and expertise. 50. Identify packages of offerings based on your staff capabilities. 51. Identify target markets that fit your capabilities. 52. Obtain a target commercial business list of owner-occupied industries. 53. Import into a contact management program (e.g., Outlook). 54. Set specific weekly goals for the number of prospects contacted, called, mailed & follow-up. 55. Set specific weekly new business appointments. 56. Clean target group list with decision makers names. 57. Mail introduction letter and line card. 58. Follow-up to identify client scope of work and develop proposals. 59. Set an appointment to present and close the business. 60. Reporting lead generation performance to a business development plan.	\$99.95
Product ID 1010	Performance Tasking & Quota Tracking & Reporting in MS Excel To report Actual Sales Tasking Plan to Quota Performance for: <ul style="list-style-type: none"> • Sales Tasking Quotas - It is the Sales Manager identifies that sets Sales Rep tasking plan quotas for service agreements and jobs by individual Sales Reps. • Demand Service Performance Measurement - At the end of each day/week, the Sales Rep's total actual new account Demand Service and total sold to date are tracked by Service Manager and reported to the Sales Rep and the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Service Agreement Performance Measurement - At the end of each day/week, the Sales Rep's total actual Service Agreements and total Service Agreements sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. 	\$99.95

	<ul style="list-style-type: none"> Project Performance Measurement - At the end of each day/week, the Sales Rep's total actual Projects and total Projects sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. 	
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3. 1-hour part three:

- Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- Technician Repair Call Check-in Opportunity Assessment Forms.
- Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. Subscription provided or purchase these documents:

Product ID 1011	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep: <ul style="list-style-type: none"> To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. To provide the means to project a professional image. Systematically gather customer & technical info. To provide the means to demonstrate performance via your best practice project installation approach. To educate and move the customer from the lowest cost option to the BEST option. To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	\$99.95
Product ID 1012	Technician Repair Call Check-in Opportunity Assessment Form In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form	\$99.95
1013	Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled <i>System Condition Report</i> . This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the	\$99.95

	end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. When used with Microsoft Office and the obtained customer's email address or cell phone number, this form enables the contractor to continue post-call harvest opportunities that remain to need attention.	
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4. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID 1018	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
1019	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
1020	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different? (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during and after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1021	<i>Project/Design-Build Agreement Proposal Template</i> Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95

Product ID	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word	
1022	<p>A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include:</p> <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part one:

- d. Sales Objections Always Fall into 1 of 5 Categories.
- e. The 4-Step Consultative Trust Selling Approach.
- f. Proactive Repair Trust-Selling Standard Procedures.
- g. Proactive Service Agreement Trust-Selling Standard Procedures.
- h. Types of Commercial Service Agreement Inspection & Repair Coverages.
- i. Service Agreement Maintenance Options.
- j. Pros & Cons by Service Agreement Type of Coverage.

k. Subscription provided or purchase these documents:

Product ID	Proactive Repair Call Handling Tasking Procedures	
1014	Service managers and repair technicians use this standard procedure document to perform the step-by-step functions of a professional service call handling procedure and forms from a lead to sold repair customer checkout. This document is provided in original MS Word format to be printed on your local printer.	\$99.95
Product ID	Proactive Service Agreement Sales Call Handling Tasking Procedures	
1015	Service managers and commercial Sales Reps use this standard procedure document to perform the step-by-step functions of a professional service agreement call handling step-by-step procedure from a lead to sold agreement. This document is provided in original MS Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95
Product ID	Service Agreement Sales First Call Handout Presentation	
1018	This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95

3. 1-hour part two:

- a. Proactive Service Agreement Trust-Selling Standard Procedures.
- b. Example: Commercial Service Agreement Long Form Maintenance Agreement.
- c. **Subscription provided or purchase these documents:**

Product ID	Commercial Service Agreement Short Form & Long Form Proposal Templates	
1019	Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95

#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part two:

- a. Service Agreement Work Delivery Tasking Standard Procedures.
- b. Example: Commercial Service Agreement Cover letter and Proposal Agreement.
- c. **Subscription provided or purchase these documents:**

Product ID	Service Agreement Work Delivery Standard Procedures	
1024	Includes step-by-step work delivery tasking standards from a lead to service agreement job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95

2. 1-hour part four:

- ooo. Equipment Start-up and Maintenance Tasking Standards.
- ppp. Management Quality Assurance Standard Procedures.
- qqq. Accounts Receivable and Payable Standard Procedures.

rrr. **Subscription provided or purchase these documents:**

Product ID	Equipment Start-up & Maintenance Tasking Procedures	
1026	These documents are used by service managers, installation managers, technicians, installers, and operations managers. HVAC service companies use this equipment start-up, text, and verification tasking procedures to adhere to the new ASHRAE standard 180P standards. These tasking procedures help you establish the minimum HVAC inspection and maintenance requirements that preserve a system's ability to achieve optimum operations. AccuTask includes 136 start-up and maintenance tasking forms for 99.9% of HVAC equipment and systems. These documents are provided in original MS Word format to be printed on your local printer.	\$159.95
1027	Accounts Receivable and Payable Standard Procedures Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. Subscription provided or purchase these documents:

Product ID	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i>	
1030	A strong set of terms and conditions is critical. It circumvents any confusion about what you are selling and the transaction terms by which you make the offer. Your payment and liability terms and conditions agreement are both a social and a legal contract. Your terms and conditions establish how you do business in a socially acceptable manner. Still, it is also a legally binding contract between you and your clients.	\$99.95

Selling Tech/Lead Tech/Technician Job Training Track

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-one:

- a. Light-Commercial Upfront Repair Pricing Method.
- b. Time & Material Repair Pricing Method.
- c. **Subscription provided or purchase these documents:**

Product ID	Done-Right Flat-Rate Price Guide You can order the Done-Right HVAC or Plumbing or as an Electrical repair guide. Select one repair guide for only \$39.95 per month, select two repair guides for only \$69.95 per month, or select all three guides for only \$79.95 per month, a 12-month subscription. <i>Includes upload data for QuickBooks™ or for your field management software.</i> Subscription consists of the following online training and resources: <ul style="list-style-type: none">• Technician Fix-Right Flat Rate USER Instructions.• Professional service call handling process.• Technician Service Call Handling Soft Skills for Proper Customer Communications.	\$39.95/M onth To \$79.95/M onth
1001		

Product ID 1002	Technician/Installer Onsite Hourly Truck and Travel Costs & Pricing Calculator Program in MS Excel This document is used by service and replacement management to calculate the upfront per trip truck and travel rate for your upfront repair and replacement price guides. This document is provided in MS Excel format with results printed on your local printer.	\$69.95
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2. 1-hour part-two:

- a. Commercial HVAC Service Agreement Pricing Method.
- b. Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.
- c. Locking in Projected Repair Revenue Pricing Strategy Review.

d. Subscription provided or purchase these documents:

Product ID 1003	EasyPrice Service Agreement Sales Call Opportunity Assessment Form Mechanical rooms or central plant areas are logical starting points for multi-facility or multi-story facilities. Starting at the mechanical room or central plant gives the salesperson a better picture of how the conditioned air or water is distributed throughout the facility(s). Understanding how the HVAC/R system is distributed enables the salesperson to look for and ask pertinent questions related to system operating and maintenance tasking requirements.	\$99.95
1004	EasyPrice Service Agreement Estimating & Pricing Program MS Excel Service managers and commercial Sales Reps use this software to perform the step-by-step functions of a professional service agreement surveying, estimating, and pricing procedure. The benefit objective is to increase profitability by implementing a professional approach to accurately and efficiently gathering customer and scope of work job data, decreasing estimating human errors, reducing work-related risk liabilities, and by improving the customer's understanding how service agreement proposal development standardization increases efficiencies while reducing business risk to the company. Includes a complete set of 72-built-in equipment and filter estimating labor and material standards for packaged RTU, built-up systems, central plant heating/cooling, and associated equipment. This software tool is provided in original MS Excel format.	\$499.95

#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part three:

- a. Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- b. Technician Repair Call Check-in Opportunity Assessment Forms.
- c. Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. Subscription provided or purchase these documents:

Product ID	Install-Right Project/Design-Build Sales Call Opportunity Assessment Form This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope	
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1011	<p>of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep:</p> <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. • To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	\$99.95
Product ID 1012	<p>Technician Repair Call Check-in Opportunity Assessment Form</p> <p>In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form</p>	\$99.95
1013	<p>Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms</p> <p>Entitled System Condition Report. This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. When used with Microsoft Office and the obtained customer's email address or cell phone number, this form enables the contractor to continue post-call harvest opportunities that remain to need attention.</p>	\$99.95

2. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.
- c. Subscription provided or purchase these documents:**

Product ID 1018	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
1019	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
1020	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different? (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during and after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1021	<i>Project/Design-Build Agreement Proposal Template</i> Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	<i>Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word</i> A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part one:

- d. Sales Objections Always Fall into 1 of 5 Categories.
- e. The 4-Step Consultative Trust Selling Approach.
- f. Proactive Repair Trust-Selling Standard Procedures.

- g. Proactive Service Agreement Trust-Selling Standard Procedures.
- h. Types of Commercial Service Agreement Inspection & Repair Coverages.
- i. Service Agreement Maintenance Options.
- j. Pros & Cons by Service Agreement Type of Coverage.

k. Subscription provided or purchase these documents:

Product ID 1014	<i>Proactive Repair Call Handling Tasking Procedures</i> Service managers and repair technicians use this standard procedure document to perform the step-by-step functions of a professional service call handling procedure and forms from a lead to sold repair customer checkout. This document is provided in original MS Word format to be printed on your local printer.	\$99.95
Product ID 1015	<i>Proactive Service Agreement Sales Call Handling Tasking Procedures</i> Service managers and commercial Sales Reps use this standard procedure document to perform the step-by-step functions of a professional service agreement call handling step-by-step procedure from a lead to sold agreement. This document is provided in original MS Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95
Product ID 1018	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95

2. 1-hour part two:

- a. Proactive Service Agreement Trust-Selling Standard Procedures.
- b. Example: Commercial Service Agreement Long Form Maintenance Agreement.

c. Subscription provided or purchase these documents:

Product ID 1019	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
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#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part one:

- d. Advantages of Work Delivery Tasking Standards.
- e. Business Functions are the Labor Tasking Activities That Must Occur.
- f. Service Repair Work Delivery Tasking Standard Procedures.

g. Subscription provided or purchase these documents:

Product ID 1023	<i>Service Repair Work Delivery Standard Procedures</i> Includes step-by-step work delivery tasking standards from a lead to repair job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part two:

- a. Service Agreement Work Delivery Tasking Standard Procedures.
- b. Example: Commercial Service Agreement Cover letter and Proposal Agreement.

c. Subscription provided or purchase these documents:

Product ID 1024	<i>Service Agreement Work Delivery Standard Procedures</i> Includes step-by-step work delivery tasking standards from a lead to service agreement job closeout. Service managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$159.95
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3. 1-hour part four:

- sss. Equipment Start-up and Maintenance Tasking Standards.
- ttt. Management Quality Assurance Standard Procedures.
- uuu. Accounts Receivable and Payable Standard Procedures.

vvv. Subscription provided or purchase these documents:

Product ID 1026	<i>Equipment Start-up & Maintenance Tasking Procedures</i> These documents are used by service managers, installation managers, technicians, installers, and operations managers. HVAC service companies use this equipment start-up, text, and verification tasking procedures to adhere to the new ASHRAE standard 180P standards. These tasking procedures help you establish the minimum HVAC inspection and maintenance requirements that preserve a system's ability to achieve optimum operations. AccuTask includes 136 start-up and maintenance tasking forms for 99.9% of HVAC equipment and systems. These documents are provided in original MS Word format to be printed on your local printer.	\$159.95
1027	<i>Accounts Receivable and Payable Standard Procedures</i> Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

Human Resource Manager Job Training Track

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#7 How to Retain the Best People with Proven Employee Retention Strategies

1. 1-hour part one:

- a. Five Business Processes That Positively Affect Employee Retention.
- b. Implementing Step-by-Step Work Delivery Standard Procedures.
- c. **Subscription provided or purchase these documents:**
 - vii. N/A

2. 1-hour part two:

- a. Implement Performance-Based Job Descriptions.
- b. Implementing Labor Billable Efficiency & Productivity Monitoring.
- c. **Subscription provided or purchase these documents:**

Product ID 1032	<i>Performance Incentive plan - Office, Technicians & Installer</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1033	<i>Performance Incentive plan - Commercial Sales Rep</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1031	<i>Complete Set Performance-Based Job Descriptions</i> These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These documents are provided in MS Word format to be printed on your local printer. Set includes: <ul style="list-style-type: none">• Dispatcher Job Description• Commercial Sales Rep Job Description	\$99.95

	<ul style="list-style-type: none"> • Service & Maintenance Technician Job Description • HVAC Installer Job Description • General Manager Job Description • Operations Manager job description • Sales Manager Job Description • Service Manager Job Description • Installation Manager Job Description • Human Resource Manager Job Description • Comptroller Job Description • Project Manager Job Description • Assistant Service Manager Job Description • HVAC Technician Instructor-Trainer Job Description • Lead Service & Maintenance Technician Job Description • Receptionist/Customer Care Specialist Job Description • Office Manager Job Description • Accounts Payable Job Description • Accounts Receivable Job Description • Truck Driver/Warehouse Supervisor Job Description 	
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3. **1-hour part three:**

- a. Implement Performance Incentive Plans.
- b. Implementing a Company Culture of Success.
- c. **Subscription provided or purchase these documents:**
 - i. N/A

#8 How to Drive Profitability Using Key Performance Indicators

1. **1-hour:**

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.
- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
- d. **Subscription provided or purchase these documents:**
 - i. N/A

#9 How to Efficiently Organize the Business for Growth

1. **1-hour:**

- a. Why We Need to Organize Business into Groups.
- b. Commercial HVAC Business Organizational Structure.
- c. Five Logical Commercial Organizational Groups/Departments.

- d. Office Admin Department Functions & Organizational Structure.
- e. Sales Department Functions & Organizational Structure Service.
- f. Service Functions & Organizational Structure.
- g. Installation Department Functions & Organizational Structure.
- h. Construction Department Functions & Organizational Structure.

i. Subscription provided or purchase these documents:

Product ID	<i>Commercial HVAC Service Contractor Organizational Charts</i>	
1036	Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company's book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all commercial HVAC companies should be organized in such a way as to compete competitively.	\$69.95

#11 How to Forecast Your Monthly Spend Plan

1. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.

d. Subscription provided or purchase these documents:

Product ID	<i>BudgetPro Annual & Monthly Budgeting Calculator</i>	
1039	One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	\$159.95

#12 How to Recruit and Retain Top Performers

3. 1-hour part one:

- a. Proven Strategies to Help You Recruit the Best.

- b. Proven Strategies to Help You Retain the Best.
- c. Why Contractors are Making Bad Hiring Decisions.
- d. The Many Costs of Making a Bad Hire.
- e. Here are 9-Tips for Hiring the Right Candidate.
- f. Checklist for Hiring Employees.
- g. Checklist for Screening an Applicant Resume.
- h. Subscription provided or purchase these documents:**
 - i. N/A**

4. 1-hour part two:

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.
- e. Subscription provided or purchase these documents:**

Product ID 1037	Employment Application This job or employment application is an official form given to applicants asking a wide range of questions both about the individual and their skills related to the job. Forms are legally defensible and stand as a way for applicants to introduce themselves to employers. Employees can be justifiably terminated for providing false information on this document that may be found post-hire. his document is provided in original MS Word format to be printed on your local printer.	\$69.95
1038	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#13 How to Select and Implement Field Management Software

5. 1-hour:

- a. Benefits of Field Service Management Software.
- b. Checklist for Selecting Field Service Management Software.
- c. Subscription provided or purchase these documents:**
 - i. N/A**

#14 How to Self-Develop Your Leadership and People Skills

5. 1-hour:

- a. Different Leadership Styles and When to Use Them.

- b. The Top Leadership Skills to Improve.
- c. Implement Your Leadership Skill Self-Development Plan.
- d. **Subscription provided or purchase these documents:**
 - ii. N/A

Wendell Bedell, Biography



Author: A to Z Book on Commercial HVAC Service Business
2022 Founded HVACPro Masterclass Business Growth Club
2021 Founded Join HVAC Success
2001 Founded Grow My HVAC

He has established himself as an expert sales trainer, business manager, author, and inspirational speaker in demand nationwide and in Canada. He has trained thousands of HVAC professionals, conducted several hundred HVAC Business Evaluations, and authored seven residential and commercial HVAC marketing, sales, services, projects, and general-service business management publications.

He has over 25 years of experience as a proven Sales and Marketing manager developing successful commercial and commercial-industrial building systems and service businesses. He has been a keynote speaker and trainer for ACCA, Design-Build Seminar, Comfortech, HVAC Service Summit, CMX & HRAC of Canada. He has sat on the Contractor Magazines Advisory Board.

Before founding Grow My HVAC, in 1998, he was President of Excellence Alliance University, an HVAC and electrical training subsidiary of Excellence Alliance, Inc., with functional responsibility for day-to-day operations, commercial and commercial-industrial education program development, and instruction.

Before that, he worked for Boston Edison and Central Maine Power for three years, establishing two high-technology design/build and energy services businesses. As Strategic Regional Manager, he was responsible for the product, promotion, and business delivery development and for recruiting, staffing, training, and deploying the account executives, design engineers, and project managers. He was also for six years on the staff of the largest independent mechanical services contractors in the Northeast -- BALCO, Inc., Boston, MA, and New England Mechanical Services, Hartford, CT. As Account Executive and Sales Manager, he won three consecutive national Most Valuable Performer Awards and several Top Managers Awards.

He holds a master's in business administration from the University of Hartford (1990), a bachelor's in business management, Westfield State College (1987), and an Associate in Industrial Electronics, New Hampshire Technical College (1981).