

A TO Z
BOOK

— ON —
COMMERCIAL
HVAC SERVICE
BUSINESS

Mastering a Thriving
Commercial **HVAC** Business

WENDELL BEDELL

A to Z Book on Commercial HVAC Service Business

The most logical step-by-step masterclass commercial
HVAC service growth program ever.

©July 21, 2022, Wendell Bedell

Commercial HVAC Business Growth Coach

P: (800) 240-2823

E: News@JoinHVACSuccess.com

W: www.JoinHVACSuccess.com

Introduction

What do commercial HVAC service business owners want? They want success, to have more leads, to make more money, and to free up more time for themselves and family. However, most of us have a problem. There is a villain called too many distractions preventing them from getting what they want. They need business help. Why? Because most contractors are confused about how to do this (especially with all the tech-driven resources out there). Plus, If I invest my time and energy, I deserve an advisor who will thoughtfully explain things.

We understand how it feels to work far more than you should for the return you are getting. It is not that you are not working hard, but you are doing the wrong work to succeed.

"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

This book gives you an efficient strategic business development tasking plan for you to take to achieve success today! **It is as simple as 1-2-3.**

Step #1: Start with Step #1 How to Price Your HVAC Services to Make a Fair Profit and continue with each consecutive chapter ending with Step #14 How to Self-Develop Your Leadership and People Skills.

Step #2: Integrate the proven HVAC business road map, complete pricing systems, operating, work delivery processes, and right-at-your-desktop online staff training and process implementation support.

Step #3: Enjoy sustainable success

You will learn to TRANSFORM your HVAC business skills to outperform the competition. Imagine what your HVAC Business's performance would look like if you could learn to run your business more like the best in the business.

Commercial HVAC Business Owner Manager Benefits

OBTAIN A CLEAR PATH TO WEALTH

We provide you with a prioritized step-by-step business development tasking plan to implement best practice processes within your business. The implementation process sequence is efficient, effective, and quickly becomes a profit center versus expense. We have customers that have gone from negative net profit before taxes to 19%+ within the first three months of implementing our best practice HVAC/R business processes.

INCREASE YOUR CHANCES OF SUCCESS

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 can train your staff on processes that can be replicated every time.

MARKET YOUR WORK BETTER

We provide you proven step-by-step commercial lead generation plan for your repair, service agreement, and retrofit/design-build project services.

SELL YOUR WORK BETTER

We provide value-based selling processes for commercial service agreements and projects that provide our clients with 60% or more close rates and higher gross profit margins versus price-only selling methods.

PRICE YOUR WORK BETTER

We provide best practice demand service, installation, the quoted project, and design-build pricing methods.

MANAGE YOUR CASH BETTER

We provide you with state-of-the-art financial budgeting and labor forecasting tools.

ORGANIZE YOUR WORK BETTER

We provide proven organizational structures and performance-based job descriptions to help you right-size to full staff utilization and manage your people to proven work delivery processes.

OBTAIN MORE PERSONAL FREEDOM

We provide you the ability to manage people to business and work delivery processes, which are the key criteria for successful contracting.

OBTAIN UNLIMITED ACCESS TO BUSINESS TRAINING

To be offered under separate cover unlimited access to online LIVE process implementation support and local classroom-based HVAC/R education and training programs.

Contents

Introduction	3
Commercial HVAC Business Owner Manager Benefits	4
Welcome to the Fastest Means to Success	10
Tools and Strategies to Increase Revenues and Profitability in a More Challenging Market ...	11
We Commercial HVAC Contractors Have a Poor Profitability Problem.....	13
Do You Have Any of These 4 Poor Profitability Symptoms?	14
14 Common Causes of Poor Profitability.....	15
This is a How-to-do Book to Profitability Grow Your Business.....	21
Learn How to Be An Effective HVAC Business Manager or Staff Member	21
This Strategic Action Tasking Plan Will Help You & Your Staff Strive to Obtain Success	22
14-Step Strategic Business Growth & Development Tasking Plan.....	23
This Strategic Business Growth & Development Tasking Plan	24
Phase #1: Proper Pricing, Increase Leads & Conversion Rates (12- Classes)	24
Phase #2: Increase Operating Efficiencies & Driving the Business (24- Classes)	25
Phase #3: Recruiting, Staffing & Improving Operating Efficiency (4- Classes)	26
Commercial HVAC Service Staff Job Training Included In the Book.....	26
Step #1 How to Price Your HVAC Services to Make a Fair Profit	28
Light-Commercial Flat Rate Repair Pricing Method	28
Time & Material Repair Pricing Method.....	30
Commercial HVAC Service Agreement Pricing Method	33
Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.....	45
Locking in Projected Repair Revenue Pricing Strategy	46
Selecting Which Project Pricing Method To Use	47
Most Common - Single Divisor Project Pricing Method Review	47
EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement	59
Most Accurate – Project Dual Rate Overhead Project Pricing Method Review	65
Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.....	69
Step #2 How to Drive Consistent Growth with Proven Lead Generation Strategies & Tactics.	70
Segmenting Commercial HVAC Markets is More Effective than Generic Marketing	72
Medium and Large Government Building Buyer Profile & Sales Positioning.....	73
Commercial Building Buyer Profile & Sales Positioning	73

Industrial Building Buyer Profile & Sales Positioning	78
College/University Building Buyer Profile & Sales Positioning.....	82
Healthcare Building Buyer Profile & Sales Positioning	86
Understanding Building Owner/Operator Roles & Responsibilities.....	91
An Effective Step-by-Step Commercial Lead Generation Strategy and Tactical Plan	94
Overcome Common Commercial HVAC Sales Objections.....	108
The 10 Commandments of Time Management.....	112
Organization Option for Implementing Commercial Lead Generation.....	112
Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms .	113
Technician Repair Call Check-in Opportunity Assessment Forms.....	114
Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms	116
Service Agreement Sales Call Opportunity Assessment Forms.....	118
Install-Right Project/Design-Build Sales Call Opportunity Assessment Form	122
Step #3 How to Win More Business by Differentiating Your Services	127
Example Design-Build Project Brand & Associated Value Positioning Statement	128
Step #4 How to Harvest More Business With Proactive Selling Strategies & Tactics.....	132
Sales Objections Always Fall into 1 of 5 Categories	133
The 4-Step Consultative Trust Selling Approach	136
Proactive Repair Trust-Selling Standard Procedures.....	137
Proactive Service Agreement Trust-Selling Standard Procedures	144
Types of Commercial Service Agreement Inspection & Repair Coverages	145
Service Agreement Maintenance Options	146
Pros & Cons by Service Agreement Type of Coverage	147
Proactive Service Agreement Trust-Selling Standard Procedures	148
Example: Commercial Service Agreement Long Form Maintenance Agreement.....	161
Proactive Project/Design-Build Trust-Selling Standards Procedures	181
Example: Design-Build/Project Cover letter and Proposal Agreement.....	197
Creating a Project/Design-Build Statement of Qualifications	216
Example: Cover Letter and Statement of Qualifications	217
Step #5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards.....	236
Advantages of Work Delivery Tasking Standards	237
Business Functions are the Labor Tasking Activities That Must Occur	238

Service Repair Work Delivery Tasking Standard Procedures	239
Service Agreement Work Delivery Tasking Standard Procedures.....	247
Project Design-Build Work Delivery Tasking Standard Procedures.....	255
Equipment Start-up and Maintenance Tasking Standards.....	266
Management Quality Assurance Standard Procedures	267
Accounts Receivable and Payable Standard Procedures	268
Inventory & Tool Control Standards Procedures.....	272
Customer Care Call Handling Standard Procedures	280
Customer Billing Standards.....	285
Field Labor Productivity Optimization Standards.....	286
Service Reporting Standard Procedures	286
Step #6 How to Protect the Business with Proper Terms & Conditions.....	288
Invoices & Proposals are Both Promotional and Legal Contracts	288
Invoices - Demand Service Payment & Liability Protection Terms & Conditions.....	289
Proposals - Service Agreement Payment & Liability Protection Terms & Conditions.....	291
Proposals - Project/Design-Build Payment & Liability Protection Terms & Conditions.....	293
Step #7 How to Retain the Best People with Proven Employee Retention Strategies.....	295
Here is a List of Reasons Why Employees Leave	295
Five Business Processes That Positively Affect Employee Retention	296
1. Implementing Step-by-Step Work Delivery Standard Procedures	296
2. Implement Performance-Based Job Descriptions	297
3. Implementing Labor Billable Efficiency & Productivity Monitoring	298
4. Implement Performance Incentive Plans	299
5. Implementing a Company Culture of Success	309
Step #8 How to Drive Profitability Using Key Performance Indicators	311
Keep your Business on Track Using KPIs.....	311
Establishing Financial & Labor KPIs	313
Common Industry Average Financial KPIs	314
Drive Profitability Using Financial KPIs	315
Using Rules-Based Management to Drive Financial KPIs	317
Prevent Running Out of Money Using Break-Even Revenue KPIs.....	319
Step #9 How to Efficiently Organize the Business for Growth.....	322
Why We Need to Organize Business into Groups	323

Commercial HVAC Business Organizational Structure	323
Five Logical Commercial Organizational Groups/Departments	324
Office Admin Department Functions & Organizational Structure	325
Sales Department Functions & Organizational Structure Service	326
Service Functions & Organizational Structure.....	326
Installation Department Functions & Organizational Structure	326
Construction Department Functions & Organizational Structure.....	327
Step #10 How to Implement Proper Customer Care Call Handling Procedures.....	327
Importance of Good Customer Care	327
Customer Care Inbound and Outbound Call Handling Script.....	328
Crucial Hiring Criteria for the Customer Care & Dispatcher Function.....	334
Organizing an Office Central Filing System.....	337
Implement Hiring Guidelines for the Customer Care/Dispatch Function	338
Customer Service 101: Proper Phone Etiquette.....	339
Implement Training for the Customer Care/Dispatch Function.....	340
Step #11 How to Forecast Your Monthly Spend Plan	343
Why You Need a Monthly Spend Plan Budget	343
Forecasting Labor Staffing Requirement by Work Catagory Procedure	344
Using BudgetPro to Develop Service Offerings Spend Plans.....	346
Step #12 How to Recruit and Retain Top Performers	347
Proven Strategies to Help You Recruit the Best	347
Proven Strategies to Help You Retain the Best	348
Why Contractors are Making Bad Hiring Decisions.....	350
The Many Costs of Making a Bad Hire.....	350
Here are 9-Tips For Hiring the Right Candidate.....	351
Checklist for Hiring Employees	353
Checklist for Screening an Applicant Resume	355
Interview Question You Must Ask	356
Exploratory Probing Questions to Determine Fit	360
Confirming Probing Questions to Determine Assumptions	361
Making the Job Offer	366
Assessing the New Hire Training Needs	366

The Coaching Process to Develop the Team and Individuals	368
The Counseling Process to Change Troublesome Work Behaviors	369
Counseling Process of a Problem Employee	370
Step #13 How to Select and Implement Field Management Software	372
Benefits of Field Service Management Software	373
Checklist for Selecting Field Service Management Software	374
Step #14 How to Self-Develop Your Leadership and People Skills.....	375
Different Leadership Styles and When to Use Them.....	380
The Top Leadership Skills to Improve.....	381
Implement Your Leadership Skill Self-Development Plan	388
Appendix A – Get a Complete Set of Operating & Work Delivery Documents	390
Appendix B – Get These Performance-Based Job Descriptions	401
Job Descriptions are Performance Contracts	401
Commercial Performance-Based Job Descriptions	402
Example Dispatcher/Customer Care Specialist Job Description	403
Example Commercial Sales Rep Job Description	407
Example Service & Maintenance Technician Job Description	411
Example HVAC Installer Job Description	417
Appendix C – Equipment Start-up Test & Verification Procedures.....	422
Example Packaged RTU Heat/Cool - AIR-COOLED Annual Inspection.....	427
Example Split-System Heat/Cool - Air-Cooled Annual Inspection.....	430
Appendix D – Need Help Expediting Change	433
Our Help can mean the Fastest Means to Success.....	433
How to Enroll in HVACPro Masterclass Business Growth Club Classes.....	434
See Appendix E – Class Descriptions & Who Should Attend	435
Index	448
Wendell Bedell, Biography	450

Welcome to the Fastest Means to Success



To work for yourself, be your own boss, and run your own HVAC business - for many, these phrases describe the American dream. However, becoming a successful HVAC business owner is not an easy task. It requires skill, motivation, demanding work, and good luck. The HVAC business owner stands on the brink of a fantastic future with a thousand HVAC-related business questions that need answers.

This HVAC Business Operating Guide is researched based on proven practices for commercial HVAC service, retrofit, update, and replacement businesses. Each departmental chapter provides a set of proven business processes, methodologies, and governances for a successful commercial HVAC business, designed to FAST TRACK your business growth and development efforts. Discover how the HVAC processes included in its chapters are fueling contractor success. Even in these fast-changing times, hundreds of the top commercial HVAC service companies have been established throughout the US and Canada.

Commercial HVAC service, retrofit, update, and replacement businesses are Defined

A Commercial HVAC service and system replacement business fall into a unique HVAC business category. They fall in with those that directly market, sell, and deliver services to individual commercial, industrial, and institutional HVAC building markets versus construction companies or those that serve general contracting entities.

Direct marketing, selling, and delivering services entails any marketing, onsite opportunity assessment survey checklist, or lead generation process. These rely on direct communication or distribution to the individual facility operator decision-maker rather than through mass media, e.g., the internet, radio, and TV. These commercial contractors have moved away from print media. They now reach and follow up on opportunities directly with the buyer of the commercial services by phone, email, text, or direct mail.

What Most HVAC Contractor Owners Want

Use this Guide to help you create a step-by-step improvement action plan for your unique business needs and to help guide your business quickly toward the 3-key HVAC business success objectives:

1. Make the phone ring more by:

- a. Improving targeting to generate more qualified leads.

- b. Improving offering resonance, differentiation, and substantiation in your value propositions.
- c. Improving your sales skills to uncover complete needs set, establish relationships, communicate solutions, negotiate a plan of attack to win business, and close deals.
- d. Improving lead conversion rates through your brand, lead nurturing, and relationship building.
- e. Improving internal communication of all work delivery stakeholders to discuss offerings and pricing models.

2. Make more money by:

- a. Improving pricing to make a fair profit while recovering field non-chargeable time.
- b. Improving the perception of service/work delivery quality.
- c. Improving the internal perception of your work, team, and company.
- d. Improving relationships with your people, establishing suitable structures, and work delivery processes.
- e. Improving surveying, estimating, and proposal writing to minimize risk, liabilities, missed opportunities, and meeting customer work delivery and financial transaction expectations.
- f. Improving cash flow and maximizing resources with proper monthly budgeting and staffing loading.
- g. Improving operating performance by using daily financial and work tasking operating performance benchmarks and rules-based management to maximize company profitability and business value.
- h. Improving productivity using performance-based incentives and incentive programs.

3. Make more FREE time for themselves and their family by:

- a. Improving and implementing standard delivery procedures that begin with a lead and go right through work close-out for all your work categories.
- b. Improving staff motivation by implementing an employee handbook, performance-based job descriptions, and performance incentives.

Tools and Strategies to Increase Revenues and Profitability in a More Challenging Market

This guide is the fastest and most logical step-by-step masterclass commercial HVAC service growth program ever. We know what commercial HVAC service contractors need to succeed in their businesses.

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. This guide offers you a way to do both. The primary purpose of this book is to act as a change management action plan to drive future revenue and operating performance. These action plans to implement proven business and work delivery processes create a roadmap for you and your staff to reach your goals. Our company can design special-purpose training 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 are ready to help guide you through the benefits of the program. We help you expedite the implementation of the books proven processes within your business. Join us today and outperform the competition within days of enrollment. Take charge. Take your HVAC business to the next level. It is your future. Use this Guide to get started.

- 100% profitability & sustainability via pricing operating standards.
- 65%+ increase service revenues.
- 50%+ service agreement close rates.
- 99% callback reduction.
- 100% customer retention.
- 100% employee retention.
- And yes, by freeing up more personal time.

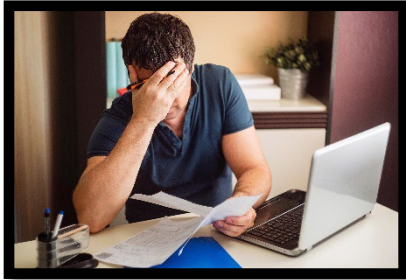
The contractors getting these results to understand the classic rules for making a first-rate service call, namely:

- Get there at the promised time.
- Diagnose the problem accurately.
- Decide whether best to repair or replace.
- Perform the work right the first time.
- Leave the work area better-looking than it was initially.

They understand extending training beyond training service technicians and installers; they also include support staff. Each employee in your service business should have:

- The knowledge to do the job right the first time.
- A desire to serve the customer in the best manner possible.
- A desire to work in an employee-friendly workplace that prioritizes making employees happy at work. We find that workforces with high job satisfaction can positively affect productivity, customer satisfaction, and overall profitability.

We Commercial HVAC Contractors Have a Poor Profitability Problem



Did you know that there are 196,000 HVAC Contractors throughout the U.S. and Canada? Studies show they ALL share a single common goal. They want to be successful-- for their families, employees, customers, and themselves.

If this sounds a lot like you and your company, doesn't it? Unfortunately, the US Census Bureau reported that the average HVAC contractor makes only 2.3% Net Profit Before

Taxes Now, which is powerfully close to making no money. Making no money is why 10% of all HVAC companies quickly experience serious cash flow problems that result in some suffering business failures. 2.3% net profit means 97.7% have POOR Profitability. However, they deserve 12%-20% due to the risk of touching a commercial business's HVAC equipment and working on their properties.

Most commercial HVAC service, retrofit, update, and replacement business owners and managers have little experience or training in the *BUSINESS* of HVAC service contracting, marketing, or selling. Most are technicians who know how to work in the industry. Many owners make a fatal assumption: if you understand the technical work, you understand a business that does that technical work. This assumption is so lethal because it is simply not true. It is the root cause of most HVAC poor profitability and business failures.

The ultimate difference between the success or failure of your contracting business is how hard you think about your business instead of how hard you work in it. We want you to think about improving your and your family's life by developing a company built on extraordinary business processes; about getting a life that is yours.

With this new thinking, let us explore these questions that contractors typically ask us when they begin thinking about improving their business and their personal life.

- How can I get my business to work without me?
- How can I get my people to work without my constant supervision?
- How can I standardize my business to be replicated and run smoothly every time?
- How can I own my business and still be free of it?
- How can I spend the time doing the work I love rather than the work I have to do?

This **Commercial HVAC Service Business Operating Guide** provides ANSWERS to improve your business's profitability and your or your manager's personal quality-of-life questions.

First, we will need an understanding of the four common poor profitability business symptoms. Then second, we need an understanding of the eight associated poor business processes that cause these poor profitability symptoms. The Guide's Table of Contents will direct you to find your unique solutions in the Guide.

Do You Have Any of These 4 Poor Profitability Symptoms?

1. **Poor Cash Flow:** Cash flow is one of the essential aspects of operating an HVAC business. Cash flow shows the money flowing into a business from sales. Interest payments received any borrowings and the amount of money flowing back out of your business. Cash flow should not be confused with profit - they are different concepts.
 - a. Suppose the cash flowing into a business does not promptly meet the cash flowing out. Eventually, a company will be unable to meet its debts and could be forced out of business. Hence to the old saying, "Cash is King."
 - b. The poor cash flow poor profitability symptom is defined as more cash flowing out than in - and is the biggest reason many HVAC businesses fail. The unfair truth is this. The HVAC services you provide may be top quality, and your business could be sound in every other way.
 - c. Still, the business could disappear if you do not manage cash flows.
2. **Low or Cyclic Revenues:** They have low or cyclic revenues. Poor or no business-to-business lead generation program attributes to cyclic revenues and inadequate cash flows. Poor lead generation can result in catastrophic cash flow problems. Also known in our industry as a "feast or famine" sales cycle.
 - a. Not using an onsite service or sales **Opportunity Assessment Forms** is attributed to cyclic revenues and inadequate cash flows.
 - b. These result in contractors missing 65% or more in revenue opportunities.
3. **Poor Customer Retention:** They have poor customer retention, which is a death knell for any service-based HVAC business. All HVAC businesses rely on customer retention to keep their companies flourishing and growing. The key to success is not a one-time buyer but the repeat buyer. Repeat buyers keep returning and become the base of your business that you can rely on for future business.
 - a. That is why customer retention is so necessary - if none of your customers return, you will never grow.
 - b. The cost of poor customer retention is huge. When customers leave your business, they take their money to your competitor. You've not only lost revenue for your business, but you have also increased the profitability of your competition.
 - c. It is a "double whammy" that can irreparably damage your business. We designed this Guide to help you quickly identify and initiate fixes to specific aspects of your business operations that are lessening profitability or customer dissatisfaction.

4. **Poor Employee Recruiting/Retention:** They have poor employee recruiting and retention, preventing them from finding, getting, and keeping good people. Low morale is the leading cause of employee turnover and is a massive barrier to effectively retaining your best employees. According to Sirota Survey Intelligence and the authors of *The Enthusiastic Employee*, 63% of those who do not feel treated with respect intend to leave within two years. Do you know what low employee morale could be costing your organization?
- a. Management understands that an employee feels treated disrespectfully or unfairly when a manager shows indifference toward the staff's working conditions.
 - b. How an employee feels and how well respected they feel is also related to how motivated they are about their employment with your company. Focusing on this area impacts how an employee feels and where you can retain them.
 - c. Compounding good people leaving the company is the failure to pay them like owners for their profitable contributions to the business.
 - d. Another key reason for people terminating is the failure of management to train their staff on best practice work delivery standards.

14 Common Causes of Poor Profitability

Let us review these poor profitability symptoms and their associated business process problems. These 14 common causes of poor profitability result in losing 85% of all HVAC start-ups within the first five years and another 10% each year after that. They are shown below in the order from most significant to most negligible impact on poor profitability and sustainability:

1. They use underpricing as a primary closing mechanism

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues.**
- b. They do not correctly recover technician and installer non-chargeable billable hours.
- c. They do not recover post-call repair or replace warranty labor and material support costs.
- d. They do not recover the overhead cost.

2. They have poor or no lead generation

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues.**
- b. They do not have a commercial HVAC service-friendly website.
- c. They do not use onsite opportunity assessment forms to identify all service opportunities on service and sales calls.
- d. They do not convert catastrophic repairs to replacements by helping clients with the repair or replace decision.

- e. They do not continue to harvest all available service opportunities post-call via seasonally timed direct email and text campaigns to target customers.

3. They lack service/product brand(s) differentiation

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 3. Poor Customer Retention.**
- b. They do not create a name, symbol, or design for service repairs, maintenance agreements, or replacements that are distinguishable as belonging to the company.
- c. They do not use branding services to help customers identify your product and distinguish them from competitor products and services.

4. They lack value-added selling processes

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 3. Poor Customer Retention.**
- b. They do not use Proactive selling vs. using low-priced reactionary selling.
- c. They do not interview customers about the system and customer needs for resolving their comfort, health, safety, property, or financial requirements.
- d. They do not use HVAC equipment's energy operating cost savings to show how much more customer is paying above the present service provider's fees.

5. They have an absence of defined operating & work delivery processes

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 3. Poor Customer Retention & 4. Poor Employee Recruiting/Retention.**
- b. They do not motivate staff to perform at higher levels using 100% customer satisfaction, 100% company profitability, and 100% employee-friendly work delivery processes.
- c. They do not use work delivery standard procedures to provide staff with the "How-to-do-Book" job training guides.
- d. They cannot reduce mobilization, human errors, missed tasking, and business risk.
- e. They cannot eliminate call-backs via quality control start-up, test & verification forms.

6. They do not use proper payment & business liability protection terms & conditions

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 3. Poor Customer Retention.**
- b. Its proposals do not use proper transaction terms and conditions to prevent severe cash flow disruptions and job cost overruns.
- c. They do not have proper proposals or invoices defining work scope, protecting payment, and eliminating job risk liabilities for all work categories.

7. They lack labor-management controls

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 3. Poor Customer Retention & 4. Poor Employee Recruiting/Retention.**
- b. They do not use step-by-step work delivery tasking standards to enable managing people to process.
- c. They do not use job descriptions with clear job expectations and establish behavior with customers, the company, and fellow employees.
- d. They do not use performance pay for management, office, or field staff to influence work behaviors to achieve conversion rates and the budgeted job hours.
- e. They do not track the billable efficiency of each field staff member.
- f. They do not track actual and compare industry conversion rates for system fixes, enhancements, accessories, replacements, and the individual service technician, selling technician, and commercial Sales Rep.

8. They lack year-round labor recruiting & retention strategies

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 4. Poor Employee Recruiting/Retention.**
- b. They do not continuously recruit to find the best people.
- c. They do not have a professional-looking website.
- d. They do not use social media like Facebook to advertise a position.
- e. They do not create recruiting handouts and flyers.
- f. They do not make sure job descriptions match the position.
- g. They do not have competitive benefits packages for office, sales, or field staff.
- h. They do not use employee networks to recruit.
- i. They do not educate techs and installers on typical repair and replacement call handling results.

- j. They do not train technicians on soft-skill communication, provide scheduled manufacturers product training, NATE certification, or conduct in-house technical cross-training.

9. They do not organize the business for efficient growth

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 4. Poor Employee Recruiting/Retention.**
- b. They do not logically organize and group the office administration delivery function.
- c. They do not logically organize and group the sale delivery function.
- d. They do not logically organize and group the service delivery function.
- e. They do not logically organize and group the system replacement or design-build delivery function.
- f. They do not logically organize and group the construction delivery function.

10. They do not have proper customer care or within the dispatch function

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 4. Poor Employee Recruiting/Retention.**
- b. They do not correctly organize customer care inbound call Club functions.
- c. They do not correctly organize customer data for easy access by the receptionist and the dispatch function to support field operations properly.

11. They do not forecast their staffing and expense budgets

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues.**
- b. They do not create a monthly spending plan for labor and equipment materials.
- c. They do not identify break-even monthly revenue to cover operating expenses - or, as they say, "just to keep the lights on."

12. They are unable to recruit & retain top performers

- a. **Negatively Impacts Symptoms 4. Poor Employee Recruiting/Retention.**
- b. They do not continuously recruit.
- c. They do not use upfront pricing with the customer.
- d. They do not price the ability to hire and retain the best people.
- e. They do not use performance incentive pay for personal contributions to company profitability.

- f. They do not use customer or employee-friendly work delivery tasking standards.
- g. They do not use job descriptions to communicate employee job and work behavior expectations.

13. They lack financial management skills & business mix tracking

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 3. Poor Customer Retention & 4. Poor Employee Recruiting/Retention.**
- b. They do not use key performance indicators to drive conversion rates per call.
- c. They do not use key performance indicators for driving business revenues, cost-of-goods-sold, overhead, and net profit before taxes in positive profit directions.
- d. It cannot connect the office with the field to schedule more jobs and get paid faster.
- e. They do not harvest post-call available opportunities via obtained customer's email or text.
- f. They do not allow technicians or installers to capture customers' signatures and authorization to work directly on their smartphones or tablet.
- g. They do not auto-record individual staff payroll clock in/clock out for time-based payroll reports.
- h. They do not use proper customer call handling to inform the customer when the service technician or installation crew is on their way via text or email.
- i. They do not integrate estimates with emails to send customers estimates, job confirmations, or invoices from the office or field handheld and smartphones.
- j. They do not get a business performance snapshot of total calls, inbound, outbounds, and no-answer calls.
- k. They do not see what channel leads came in from, why the customer called, and whether it converted into a job or an estimate.
- l. They do not easily access customers' contact information or establish their personal communication preferences.
- m. They cannot obtain work updates, make deposits, send invoices, take payments automatically, and seamlessly update QuickBooks for you.
- n. They do not have immediate access to all customer contacts and equipment information to enable the job to be fixed or installed the first time.

14. They lack leadership training & education plans

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 3. Poor Customer Retention & 4. Poor Employee Recruiting/Retention.**
- b. Managers or supervisors do not use proven staff motivation techniques.

- c. Managers or supervisors do not understand what successful leadership behavior characteristics they should strive to improve.
- d. Managers or supervisors do not have a continuous leadership skill self-development plan.

This is a How-to-do Book to Profitability Grow Your Business



You can use this Guide as your **Strategic Action Tasking Plan**. Other than giving up to 9% to 14% right off the top of your company's revenues to a franchise, just to get this complete business operating guidance.

You will find that this book delivers the greatest and most logical step-by-step masterclass commercial HVAC service growth program ever.

The more profitable commercial HVAC service, retrofit, & replacement business are growing 27% more annually even during these tough economic times. Many of our clients have a banner year because they build up their service agreement base and provide top-notch professional HVAC services. There is no secret. It is all about managing people to processes.

We created this Guide as a guide as a low-cost means to help commercial HVAC service, retrofit, & replacement businesses to quickly implement efficient and effective professional operations used by the more profitable contractors.

What are our more profitable commercial HVAC service, retrofit, update, and replacement businesses doing differently from the rest? Our clients use this operating Guide's proven commercial processes, methodologies, governances, and associated delivery forms within their commercial HVAC service business.

Within each chapter, we reference commercial business standards and forms. To order the presented business standards or documents, go to Appendix A - Need Help? Order These Business Operating Documents where you can get details by product ID number.

Learn How to Be An Effective HVAC Business Manager or Staff Member

Your employees are the ones delivering your products and services. It is your manager's job to make sure they do it efficiently. There are some universally "wrong" ways to manage an HVAC business. Ignoring them has caused many thousands of contractors to go out of business within the first 5-years of opening their doors. And another 10% goes out of business every year after that.

It would be best if you avoid business mistakes by complying with these essential business operating ground rules (maxims) of effective business operating management:

- You only need employees in your business to process your book of business.
- You need a company operating and work delivery processes for employees to follow and management to manage its people to process.
- You need job descriptions with all employees to get them under contract to provide a set of labor tasking services for a fee (wages).
- You only need managers in your business to manage your people to process.
- You should staff up to 100% labor utilization to prevent higher operating costs than the competition. Underutilized labor capacity recovery in your pricing can cost you jobs.
- You should have proper payment and transaction terms and conditions to protect the business from non-payment and regular business operating liabilities.

This Strategic Action Tasking Plan Will Help You & Your Staff Strive to Obtain Success

This Guide will help you strive to obtain these successful characteristics of success as found in the top HVAC commercial business throughout the US and Canada:

- They possess a service delivery strategy developed for each service or job offering.
- They know that employee relations mirror customer relations and understand that employees with positive attitudes about their company will transmit this to commercial customers.
- They automate high-touch service systems *everywhere possible* with a 100% client satisfaction focus and a 100% employee-friendly focused built-in delivery process.
- They measure their business and service delivery performance to verify that their pricing, labor productivity, and work delivery processes are profitable. They also make the results known to all work delivery stakeholders.
- They do not invoice any customer willing to “pay now” upon completion.

14-Step Strategic Business Growth & Development Tasking Plan



This operations and procedure Guide contains the best-of-the-best-practice information about operating a commercial HVAC service, retrofit, & replacement business. You can use the processes right off the shelf or customize them to your unique business requirements.

This Guide is created specifically for your administration, HVAC service, retrofit, & replacement business department's management and staff. It provides you and them with a resource to refer to when in doubt about how to go about a task, specific business policy, or work delivery process or forms.

It is a terrific manager reference guide for choosing the right direction for your commercial HVAC service, retrofit, & replacement business. It is also a great starting point for someone who knows nothing about successfully running a profitable and sustainable commercial HVAC service business.

Commercial HVAC managers across the board list the top 3 most important profitably growing business issues:

1. Generating sales and revenue.
2. Onboarding new hires on remote work technologies.
3. Training staff on work delivery processes.

You will find proven growth answers to these profitably growing business issues.

This 14 step-by-step strategic business growth & development tasking plan and the available live training through the HVACPro Masterclass Business Growth Club are provided in the same logical 3-Phase Business Development Plan.

Today, we live in a time where there is simply no "not knowing." Suppose you or someone processing your book of business lacks the answer to their question. In that case, the information is seconds away with this Guide and our live and recorded HVACPro Masterclass Business Growth Club classes.

Confidence is critical in this business environment. Without having confidence in their learning, people are hesitant to adopt best practices and move their businesses forward.

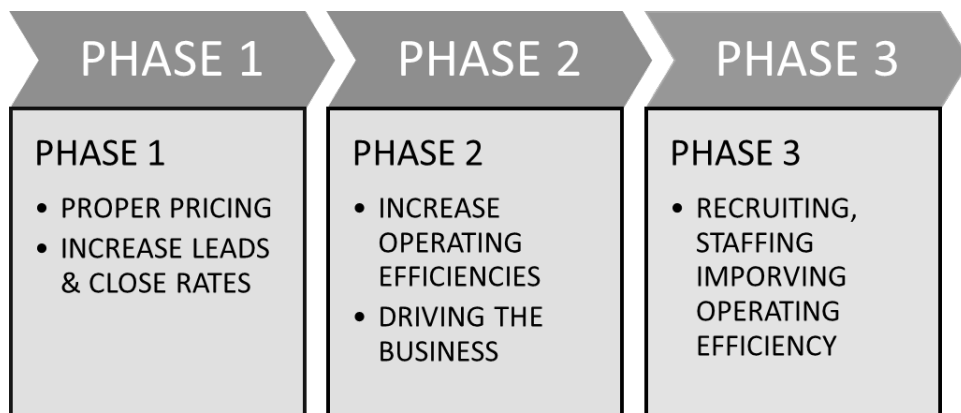
We are a single source of commercial HVAC service business truth to ensure learners trust the knowledge and information delivered. We have logically organized learning content that connects you and your staff to relevant information in a familiar, easy-to-use format.

This Strategic Business Growth & Development Tasking Plan

Where should you start your business growth and development? We recommend starting with implementing the #1. How to Price Your HVAC Services to Make a Fair Profit chapter. Why? Business consultants always begin by verifying that the business is pricing its work to be sustainable. The first thing to do is confirm that you can cover operating overhead expenses to keep the door open and to be able to make payroll. Not to mention that not paying staff is illegal.

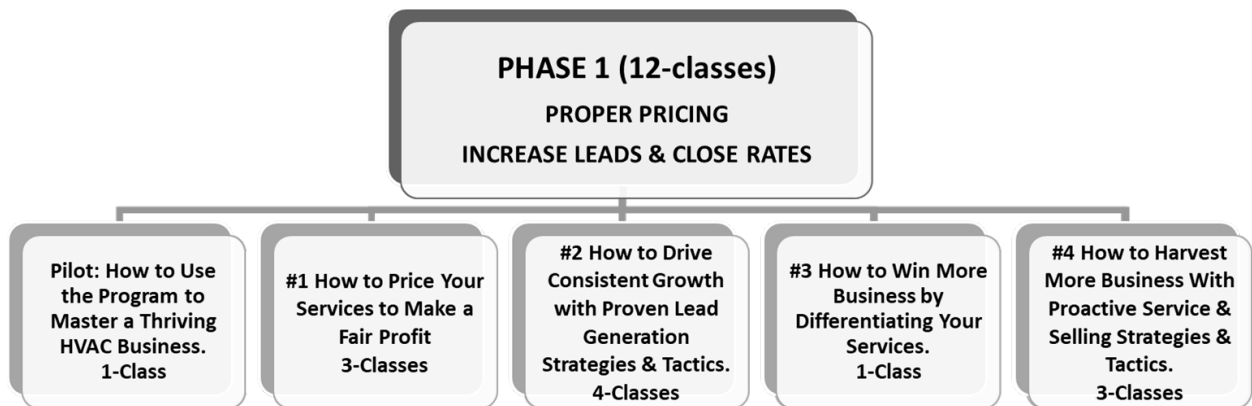
We recommend you work through the 14 step-by-step business growth and develop chapters in the logical order that business development consultants use. Start with #1 and then continue consecutively to impact your profitability and sustainability significantly.

This business development program is grouped into (3) three logical business growth phases, with each class delivered in sequence.



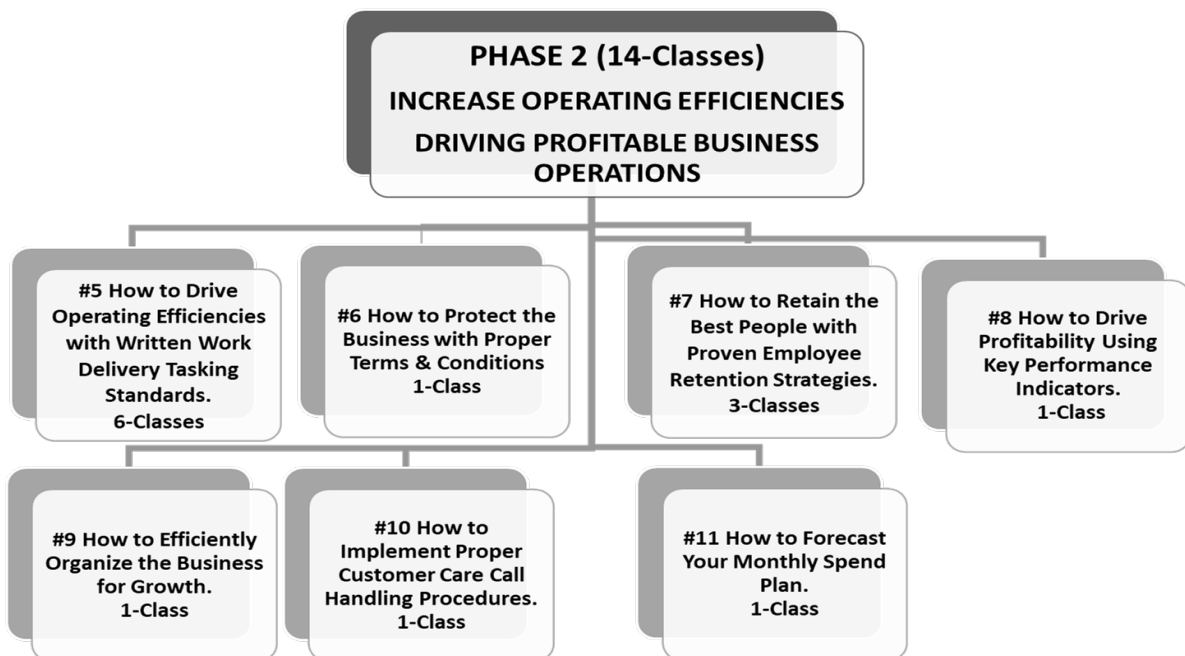
Phase #1: Proper Pricing, Increase Leads & Conversion Rates (12- Classes)

1. How to Price Your HVAC Services to Make a Fair Profit.
2. How to Drive Consistent Growth with Proven Lead Generation Strategies & Tactics.
3. How to Win More Business by Differentiating Your Services.
4. How to Harvest More Business with Proactive Service & Selling Strategies & Tactics.



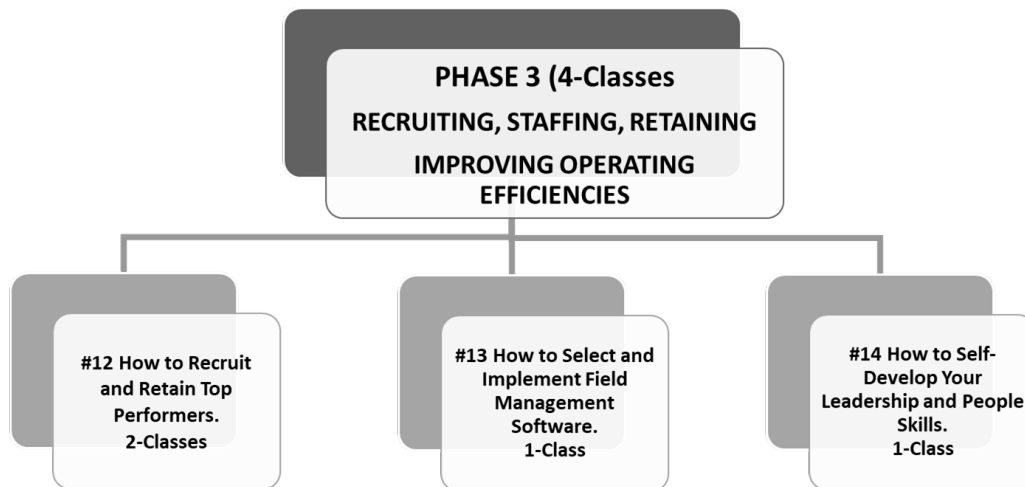
Phase #2: Increase Operating Efficiencies & Driving the Business (24- Classes)

5. How to Drive Operating Efficiencies with Work Delivery Tasking Standards.
6. How to Protect the Business with Proper Terms & Conditions.
7. How to Retain the Best People with Proven Employee Retention Strategies.
8. How to Drive Profitability Using Key Performance Indicators.
9. How to Efficiently Organize the Business for Growth.
10. How to Implement Proper Customer Care Call Handling Procedures.
11. How to Forecast Your Monthly Spend Plan.



Phase #3: Recruiting, Staffing & Improving Operating Efficiency (4- Classes)

- 12. How to Recruit and Retain Top Performers.
- 13. How to Select and Implement Field Management Software.
- 14. How to Self-Develop Your Leadership and People Skills.



Commercial HVAC Service Staff Job Training Included In the Book

This Guide provides you and your staff job training on best practice work delivery processes. An essential quality of learning is that it must demonstrate its relevance to the learner. Learners want to know how the class content relates to them and their job roles and responsibilities to help them do their job better.

We recommend that people performing these job duties below read their relevant job's work delivery standards from a lead to job close-out:

Owners /Managers

- Owners/General Managers
- Sales Managers
- Marketing Managers
- Service Managers

- Operation Managers
- Installation Managers
- Office Managers
- Project Managers
- Inventory Control Managers
- Accounting Managers
- Warehouse Managers
- Human Resources Managers
- Fleet Managers
- Those Buying an HVAC Business

Office Support Staff

- Dispatchers
- Receptionists
- Bookkeepers
- Payroll Administrators
- Sales Support
- Accounts Payable/Receivables

Field Staff

- Service Agreement Sales Reps
- Project/Estimator Sales Reps
- Project Managers
- Project Estimators
- Technicians
- Crew Chiefs
- Installers

Appendix D – Need Help Expediting Change



Today's HVAC business owners and managers may know how to make repairs, upgrades, and system replacements, but most do not know how to 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 managers 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.

How to Enroll in HVACPro Masterclass Business Growth Club Classes

This program contains the best-of-the-best-practice information about operating a commercial HVAC service, retrofit, & replacement business. You can use the processes right off the shelf or customize them to your unique business requirements.

The A-to-Z book is a terrific manager reference guide for choosing the right direction for your commercial HVAC service, retrofit, & replacement business. This program provides live implementation support for its operational and work delivery processes.

It is also a great starting point for someone who knows nothing about successfully running a profitable and sustainable commercial HVAC business.

- The client visits www.JoinHVACSuccess.com and clicks on the “Commercial Growth Club” top menu to review detailed HVACPro Masterclass Business Growth Club classes and the online enrollment form.
- Option #1 – Client selects to purchase A to Z Book on Commercial HVAC Service Business eBook and to pick and choose future class enrollment:
 - Client selects by entering x Enrollee authorizes Join HVAC Success to charge an enrollment fee amount of \$99.95. Unless you selected to attend all 29-classes below, and enrollment includes the A-to-Z Book on Commercial HVAC Service Business eBook. Enrollee may register for a class on www.JoinHVACSuccess.com and pay an enrollment fee of \$49.95 to attend.
- Option #1 – Client selects purchase A to Z Book on Commercial HVAC Service Business eBook and enrolls in all 29 HVACPro Masterclass Business Growth Club classes:
 - Client selects by entering x Enrollee authorizes Join HVAC Success to charge a fee amount of \$99.95/month paid monthly in advance for 12 months, commencing on the effective date of this Agreement and to enroll to attend all 29-classes and enrollment includes the A-to-Z Book on Commercial HVAC Service Business eBook.
- The client selects which of the (29) live and recorded 1-hour classes to take and selects a class time at 9 am, 10 am, or 1 pm time slots Tuesday-Wednesday-Thursday except on Holidays or instructor during vacation periods.
- Attendees find immediate one-on-one management help implementing proven work delivery standard processes contained in the book.
- These client training classes have helped thousands of commercial HVAC service businesses grow exponentially.

See Appendix E – Class Descriptions & Who Should Attend

#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. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Service Managers
 - iv. Lead Technicians
 - v. Selling Technicians
 - vi. Technicians

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. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Sales Managers
 - iv. Service Managers
 - v. Commercial Service Agreement Sales Reps
 - vi. Selling Technicians

3. 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. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Sales Managers
 - iv. Service Managers
 - v. Installation Managers
 - vi. Project/Design-Build Estimators
 - vii. Commercial Project/Design-Build Sales Reps
 - viii. Commercial Service Sales Reps

#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. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Sales Managers
 - iv. Marketing Managers
 - v. Commercial Project/Design-Build Sales Reps
 - vi. Commercial Service Sales Reps

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. Who should attend:

- i. General Managers
- ii. Operations Managers
- iii. Sales Managers
- iv. Marketing Managers
- v. Commercial Service Agreement Sales reps
- vi. Commercial Project/Design-Build Sales reps

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. Who should attend:

- i. General Managers
- ii. Operations Managers
- iii. Sales Managers
- iv. Marketing Managers
- v. Service Managers
- vi. Selling Technicians
- vii. Technicians

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. Who should attend:

- i. General Managers
- ii. Operations Managers
- iii. Sales Managers
- iv. Marketing Managers
- v. Service Managers
- vi. Commercial Service Agreement Sales reps
- vii. Selling Technicians

- ix. Technicians

Step #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. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Marketing Managers
 - iv. Sales Managers

Step #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. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Marketing Managers
 - iv. Sales Managers

2. 1-hour part two:

- n. Proactive Service Agreement Trust-Selling Standard Procedures.
- o. Example: Commercial Service Agreement Long Form Maintenance Agreement.
- p. Who should attend:
 - i. General Managers

- ii. Operations Managers
- iii. Marketing Managers
- iv. Sales Managers
- v. Commercial Service Agreement Sales reps
- vi. Selling Technicians

3. 1-hour part three:

- q. Proactive Project/Design-Build Trust-Selling Standards Procedures.
- r. Example: Design-Build/Project Cover letter and Proposal Agreement.
- s. Creating a Project/Design-Build Statement of Qualifications.
- t. Example: Cover Letter and Statement of Qualifications.
- u. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Marketing Managers
 - iv. Sales Managers
 - v. Project Managers
 - vi. Commercial Project/Design-Build Sales Reps

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

1. 1-hour part one:

- v. Advantages of Work Delivery Tasking Standards.
- w. Business Functions are the Labor Tasking Activities That Must Occur.
- x. Service Repair Work Delivery Tasking Standard Procedures.
- y. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Service Managers
 - iv. Selling Technicians
 - v. Lead Technicians
 - vi. Technicians
 - vii. Receptionists

- viii. Dispatchers
- ix. Bookkeepers
- x. Accounting

2. 1-hour part two:

- a. Service Agreement Work Delivery Tasking Standard Procedures.
- b. Example: Commercial Service Agreement Cover letter and Proposal Agreement.
- c. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Service Managers Sales Managers
 - iv. Commercial Service Agreement Sales Reps
 - v. Selling Technicians
 - vi. Receptionists
 - vii. Dispatchers
 - viii. Bookkeepers
 - ix. Accounting

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.
- a. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Service Managers Sales Managers
 - iv. Commercial Project/Design-Build Sales Reps
 - v. Selling Technicians
 - vi. Receptionists
 - vii. Dispatchers
 - viii. Bookkeepers
 - ix. Accounting

4. 1-hour part four:

- e. Equipment Start-up and Maintenance Tasking Standards.
- f. Management Quality Assurance Standard Procedures.
- g. Accounts Receivable and Payable Standard Procedures.
- h. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Service Managers
 - iv. Sales Managers
 - v. Installation Managers
 - vi. Selling Technicians
 - vii. Technicians
 - viii. Receptionists
 - ix. Dispatchers
 - x. Bookkeepers
 - xi. Accounting

5. 1-hour part three:

- i. Inventory & Tool Control Standards Procedures.
- j. Customer Care Call Handling Standard Procedures.
- k. Customer Billing Standards.
- l. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Service Managers
 - iv. Sales Managers
 - v. Installation Managers

6. 1-hour part three:

- m. Field Labor Productivity Optimization Standards.
- n. Service Reporting Standard Procedures.
- o. Who should attend:
 - i. General Managers
 - ii. Operation Managers Marketing Managers
 - iii. Service Managers

- iv. Selling Technicians
- v. Technicians

Step #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. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Service Managers
 - iv. Sales Managers
 - v. Commercial Service Agreement Sales Reps
 - xi. Commercial Project/Design-Build Sales Reps

Step #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. Who should attend:
 - vi. General Managers
 - vii. Operations Managers
 - viii. Service Managers
 - ix. Sales Managers
 - x. Installation Managers
 - xi. Human Resource Managers

2. 1-hour part two:

- a. Implement Performance-Based Job Descriptions.

- b. Implementing Labor Billable Efficiency & Productivity Monitoring.
- c. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Service Managers
 - iv. Sales Managers
 - v. Installation Managers
 - xii. Human Resource Managers

3. 1-hour part three:

- a. Implement Performance Incentive Plans.
- b. Implementing a Company Culture of Success.
- c. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Service Managers
 - iv. Sales Managers
 - v. Installation Managers
 - vi. Human Resource Managers

Step #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. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Service Managers
 - iv. Sales Managers

- v. Installation Managers
- vi. Accounting

Step #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. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Service Managers
 - iv. Sales Managers
 - v. Installation Managers
 - vi. Construction Managers
 - vii. Office Managers

Step #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. Who should attend:

- i. General Managers
- ii. Operations Managers
- iii. Service Managers
- iv. Sales Managers
- v. Installation Managers
- vi. Accounting

Step #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. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Service Managers
 - iv. Sales Managers
 - v. Installation Managers
 - vi. Construction Managers
 - vii. Accounting

Step #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. Who should attend:
 - i. General Managers

- ii. Operations Managers
- iii. Service Managers
- iv. Sales Managers
- v. Installation Managers
- vi. Construction Managers
- vii. Office Managers
- viii. Human Resource Managers

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. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Service Managers
 - iv. Sales Managers
 - v. Installation Managers
 - vi. Construction Managers
 - vii. Office Managers
 - viii. Human Resource Managers

Step #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. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Service Managers
 - iv. Installation Managers
 - ix. Accounting

Step #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. Who should attend:
 - i. General Managers
 - ii. Operations Managers
 - iii. Sales Managers
 - iv. Service Managers
 - v. Installation Managers
 - vi. Accounting

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).