

A TO Z BOOK



ON RESIDENTIAL

HVAC

SERVICE BUSINESS

STAFF JOB TRAINING TRACKS

WENDELL BEDELL

Residential HVAC Service Job Training Tracks

©October 13, 2022, Wendell Bedell

Residential HVAC Business Growth Coach

P: (800) 240-2823

E: News@JoinHVACSuccess.com

W: www.JoinHVACSuccess.com

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 residential 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 residential and commercial HVAC service contractor growth, we see up to a 65%+ increase in revenues, profits and contractor sustainability..

"I looked at all of the major consulting services, and felt that Wendell Bedell's, President of Grow My HVAC offered the best value. We're using his Goodman flat rate service, flat rate installation price books and other Ready-Built HVAC professional business processes and practices. My assign coach is very responsive, and was adaptive to some of our unique business needs. We view their services as complete business system, pricing system and an affordable alternative to a franchise."

Frank DiGirolamo
Progressive Air Solutions, NJ

We have been using Wendell Bedell's, President of Grow My HVAC for a couple years and can only say great job to Wendell and his team. Our growth has been consistent since we started on the program and our profits are up. I have found if you just follow the program and with practice you can become a very professional comfort advisor and harvest more opportunities that we may have overlooked in the past. Would highly recommend this program."

Clint Green
Premier Heating & Air Conditioning, ID

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.

Table of Contents

Introduction	ii
Need Help Expediting Change	4
General Manager/Operation Manager Job Training Track	5
Marketing Manager Job Training Track	18
Office Manager Job Training Track	25
Receptionist Job Training Track.....	31
Bookkeeper Job Training Track	33
Accounting Job Training Track.....	36
Service Manager Job Training Track	40
Dispatcher/Customer Care Manager Job Training Track	49
Installation/Construction Manager Job Training Track.....	51
Comfort Advisor Job Training Track.....	57
Selling Technician Job Training Track.....	62
Lead Technician/Technician Job Training Track	69
Human Resource Manager Job Training Track	73

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 residential 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 residential 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 Residential 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 Manager Job Training Tracks 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 Stop UnderPricing Your Services to Make a Fair Profit

2. 1-hour part-one:

- a. Selling based on value - not price
- b. Get paid for the 90% of the value you are bringing to the job.
- c. Why Upfront Flat Rate Pricing is Needed.
- d. Upfront flat-rate repairs best practice price guide format.
- e. **Subscription provided or purchase these documents:**

Product ID	Fix-Right Flat-Rate Price Guide You can order the Fix-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/Month To \$79.95/Month
1001		

- e. Review the inside equipment survey form.
- f. Review the outside equipment survey form.
- g. **Subscription provided or purchase these documents:**

Product ID	Onsite System Replacement Opportunity Assessment Form The On-site System Replacement Opportunity Assessment Survey Form assists the Selling Technician or Comfort Advisor to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right objectives are to help the Selling Technician or Comfort Advisor:	
1006	<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. <p>To provide the means to complete the sales call and close the transaction in 1 sales call.</p>	\$99.95

#3 How to Stop Losing to Competitors by Value Positioning Your Services

1-hour:

- a. Review product or service brand name and positioning.
- b. Review examples of repair services positioning.
- c. Why it is important to create your product or service brands.
- d. We present an example service agreement brand positioning statement to be used in promotional materials.
- e. **Subscription provided or purchase these documents:**
 - i. N/A

#4 How to Stop Selling and Start Consulting & Telling

1. 1-hour part one:

- a. Review the 4-Steps of the consultative trust selling approach.
- b. Review why you need to standardize the service call handling process.
- c. Review why business growth & sustainability depends on selling service agreements.
- d. Review proactive repair trust-selling standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1007	<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
------------------------	---	----------------

2. 1-hour part two:

- e. Understanding the Service Agreement Business.
- f. Review of the many customer benefits of a service agreement.
- g. Review the many company operating and business value benefits of service agreements.
- h. Review customer service agreement expectations.
- i. Review proactive service agreement trust-selling standards.

a. Subscription provided or purchase these documents:

Product ID 1008	<i>Proactive Service Agreement Sales Call Handling Tasking Procedures</i> Service managers, selling technicians and technicians use this standard procedure document to perform the step-by-step procedures of a professional service agreement call handling 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
------------------------	--	----------------

3. 1-hour part three:

- j. Review the system replacement business.
- k. Review of proactive trust-selling system replacement standards.

l. Subscription provided or purchase these documents:

Product ID 1009	<i>Proactive Replacement Trust-Selling Standards Procedures</i> The selling technician and comfort advisors use this selling standard procedure to perform the step-by-step functions of professional project/design-build sales and operations from a lead to booking a sold replacement job. This document is provided in original MS Word, Excel, PowerPoint, and Acrobat PDF format to be printed on your local printer.	\$99.95
1010	<i>Replacement Sales Presentation (This is included in our Home Comfort Falat Rate Price Guide</i> This promotional tool is used by selling technicians and comfort advisors on a request for 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-installation, and (5) Investment Option Price Sheet to provide an upfront itemize and logical installation sequence and price to the customer. This promotional contract is provided in original MS PowerPoint format to be printed on your local printer.	\$99.95

Product ID 1011	HVAC System Replacement Proposal Agreement Selling technicians and comfort advisors use this promotional and system replacement transaction contract. This document is multi-form; this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	Order from Print Vendor
1012	Ductless Mini-Split-System Replacement Proposal Agreement Selling technicians and comfort advisors use this promotional and system replacement transaction contract. This document is multi-form; this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	Order from Print Vendor
1013	Boiler System Replacement Proposal Agreement Selling technicians and comfort advisors use this promotional and system replacement transaction contract. This document is multi-form; this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	Order from Print Vendor
1014	Protect Service Agreement Access to print vendor included in Complete Appendix B Documentation Set. Technicians use this promotional and maintenance transaction contract. This document is multi-form, and this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	Order from Print Vendor
1032	Which Contractor Best Meets Your Needs Questionnaire in MS Excel Typically, when a customer does not sign, obtain the Which Contractor Best Meets Your Needs? Introduce this 20-questionnaire to the customer as a courtesy to our clients. This questionnaire helps the customer not get damaged by using an unworthy contractor. Nine out of ten times, the customer will not even get past the first five questions. For example, question 4 asks, "Do you perform drug testing to screen employees for hire?". Simply explain to the customer the following. Suppose a contractor comes on your property with an employee under the influence of drugs and gets hurt. In that case, they can sue you personally for allowing them to work on your property stoned. Ouch. Why is this an important question to ask? As proof, when contractors recruit technicians and installers applicants for hire and tell applicants that drug testing is required, only 6 out of 10 applicants return.	\$99.95

#5 How to Stop Inefficiencies with Proven Work Delivery Standards

1. 1-hour part one:

- a. How to get input and buy-in from all work delivery stakeholders.
- b. Review the business functions that must occur to be in business.
- c. Review why we need written work delivery standards.
- d. Review from a lead to job close out best practice service repair work delivery standards.
- a. **Subscription provided or purchase these documents:**

1015	<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
1018	<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

2. 1-hour part two:

- a. Review from a lead to job close out, best practice written service agreement work delivery standards.
- b. **Subscription provided or purchase these documents:**

Product ID 1016	<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
------------------------	--	-----------------

3. 1-hour part three:

- a. Review from a lead to job close out, best practice written system replacement work delivery standards.
- b. Creating a Project/Design-Build Statement of Qualifications.
- c. Example: Cover Letter and Statement of Qualifications.
- a. **Subscription provided or purchase these documents:**

Product ID 1017	<i>System Replacement Work Delivery Standard Procedures</i> 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
------------------------	--	-----------------

4. 1-hour part four:

- d. Review best practice quality assurance standards.
- e. Review best practice accounts receivable and payable standards.
- f. How to define your credit terms.
- g. Review how to create an accounts receivable aging report.

h. Review of other best practice account receivable procedures.

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

Product ID 1019	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:**

- i. Review best practice inventory control standards.
- j. Review effective customer care call handling standards.
- k. Review the customer billing or invoicing requirements.
- l. Review proven field labor optimization strategies.
- m. Review how to implement an effective performance monitoring & reporting process.

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

Product ID 1020	Inventory and Tool Control Standard Procedures 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
1021	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 to Reschedule the Appointment	\$99.95

#6 How to Stop No Pay & Business Risk with Proper Terms & Conditions

1. **1-hour:**

- a. Review how your invoice or proposal agreement is a business contract.
- b. Review service repair payment & liability protection terms & conditions.
- c. Service agreement payment & liability protection terms & conditions.
- d. System replacement payment & liability protection terms & conditions.

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

Product ID 1022	Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set <ul style="list-style-type: none">• 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	\$99.95
----------------------------------	---	----------------

	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.	
--	--	--

#7 How to Stop Losing Good People with Proper Hiring & Retention Strategies

1. 1-hour part one:

- a. Review how to implement work delivery standards.
- b. Review how to implement performance-based job descriptions.
- c. Review how to implement labor billable efficiency & productivity monitoring process.
- d. Review how to implement a company culture of success.
- e. Review how performance incentives help achieve business objectives by adhering to a high standard code of conduct.
- f. Review a best practice performance incentive plan for office staff, technicians, selling technicians, and Installers.
- g. Review a best practice performance incentive plan for comfort advisors.
- h. **Subscription provided or purchase these documents:**

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:	
1023	<ul style="list-style-type: none"> • Dispatcher Job Description • Comfort Advisor 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
	Performance Incentive plan - Office, Technicians & Installer	

1024	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
1025	<i>Performance Incentive plan - Comfort Advisor</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 for only \$69.95.	\$69.95
1029	<i>Employment Application</i> 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

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

- a. Review how to hire for the customer care and dispatch function.
- b. Review a best practice on training the customer care and dispatch function.
- c. **Subscription provided or purchase these documents:**

Product ID	<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
1027	<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

#8 How to Stop Lost Profitability by Driving the Business with KPIs

1. **1-hour:**

- a. How to tracking business income and expenses.
- b. How to use KPIs to keep your business on the right track.
- c. How to establish individual opportunity conversion & productivity KPIs.
- d. How to establish financial KPIs with rules-based management.
- e. How to calculate your break-even revenue to cover overhead and NPBT.

- f. Review the power of using KPI' to increase profitability.
- g. **Subscription provided or purchase these documents:**
 - i. N/A

#9 How to Stop Chaos by Organizing the Business for Growth

- 1. **1-hour:**
 - a. Residential HVAC Business Must-Do Tasking Functions Review.
 - b. Office Admin Department Functions & Organizational Structure.
 - c. Sales Department Functions & Organizational Structure.
 - d. Service Department Functions & Organizational Structure.
 - e. Installation Department Functions & Organizational Structure.
 - f. Construction Department Functions & Organizational Structure.
 - g. **Subscription provided or purchase these documents:**

Product ID	<i>Residential HVAC Service Contractor Organizational Charts</i>	
1028	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 residential HVAC companies should be organized in such a way as to compete competitively.	\$69.95

#10 How to Stop Losing Customers via Proper Customer Care Handling

- 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:**
 - i. N/A

#11 How to Stop Losing Financial Control by Forecasting Monthly Labor & Expenses

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. 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
1031		

#12 How to Stop Your Inability to Recruit & 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	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
1030		

1029	<i>Employment Application</i> 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
-------------	---	----------------

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

- a. Making the Job Offer
- b. Assessing New Hire Training Needs
- c. The Top Reasons Why Continuous Job Training is Necessary
- d. The Coaching Process to Develop the Team and Individuals
- e. The Counseling Process to Change Troublesome Work Behaviors.
- f. **Subscription provided or purchase these documents:**

<i>Product ID</i> 1030	<i>Employee Counseling Form</i> 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 Stop Guide Operating Chaos with 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:**

#14 How to 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:**

Marketing Manager Job Training Track

Pilot - How to Master a Thriving Residential 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 Manager Job Training Tracks 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:**

#1 How to Stop UnderPricing Your Services to Make a Fair Profit

1. 1-hour part-one:

- a. Selling based on value - not price
- b. Get paid for the 90% of the value you are bringing to the job.
- c. Why Upfront Flat Rate Pricing is Needed.
- d. Upfront flat-rate repairs best practice price guide format.
- e. **Subscription provided or purchase these documents:**

Product ID 1001	Fix-Right Flat-Rate Price Guide You can order the Fix-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. Includes upload data for QuickBooks™ or for your field management software. 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/Month To \$79.95/Month
Product ID 1002	Three Upfront Flat-Rate Price Guide Set – Repair, Replacement & Ductless Mini-Split You can order the Fix-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. Includes upload data for QuickBooks™ or for your field management software. Subscription consists of the following online training and resources: <ul style="list-style-type: none">• Technician Fix-Right Flat Rate USER Instructions.	\$39.95/Month To \$79.95/Month

	<ul style="list-style-type: none"> Professional service call handling process. Technician Service Call Handling Soft Skills for Proper Customer Communications. 	
--	---	--

#3 How to Stop Losing to Competitors by Value Positioning Your Services

1-hour:

- a. Review product or service brand name and positioning.
- b. Review examples of repair services positioning.
- c. Why it is important to create your product or service brands.
- d. We present an example service agreement brand positioning statement to be used in promotional materials.
- e. **Subscription provided or purchase these documents:**
 - ii. N/A

#4 How to Stop Selling and Start Consulting & Telling

1. 1-hour part two:

- m. Understanding the Service Agreement Business.
- n. Review of the many customer benefits of a service agreement.
- o. Review the many company operating and business value benefits of service agreements.
- p. Review customer service agreement expectations.
- q. Review proactive service agreement trust-selling standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1008	<i>Proactive Service Agreement Sales Call Handling Tasking Procedures</i> Service managers, selling technicians and technicians use this standard procedure document to perform the step-by-step procedures of a professional service agreement call handling 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
------------------------	--	----------------

2. 1-hour part three:

- r. Review the system replacement business.
- s. Review of proactive trust-selling system replacement standards.
- t. **Subscription provided or purchase these documents:**

Product ID 1009	<i>Proactive Replacement Trust-Selling Standards Procedures</i> The selling technician and comfort advisors use this selling standard procedure to perform the step-by-step functions of professional project/design-build sales and operations from a lead to booking a sold replacement job. This document is provided in original MS Word, Excel, PowerPoint, and Acrobat PDF format to be printed on your local printer.	\$99.95
------------------------	--	----------------

Product ID	Replacement Sales Presentation (This is included in our Home Comfort Falat Rate Price Guide) This promotional tool is used by selling technicians and comfort advisors on a request for 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-installation, and (5) Investment Option Price Sheet to provide an upfront itemize and logical installation sequence and price to the customer. This promotional contract is provided in original MS PowerPoint format to be printed on your local printer.	\$99.95
1010		

#7 How to Stop Losing Good People with Proper Hiring & Retention Strategies

1. 1-hour part one:

- a. Review how to implement work delivery standards.
- b. Review how to implement performance-based job descriptions.
- c. Review how to implement labor billable efficiency & productivity monitoring process.
- d. Review how to implement a company culture of success.
- e. Review how performance incentives help achieve business objectives by adhering to a high standard code of conduct.
- f. Review a best practice performance incentive plan for office staff, technicians, selling technicians, and Installers.
- g. Review a best practice performance incentive plan for comfort advisors.
- h. **Subscription provided or purchase these documents:**

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: <ul style="list-style-type: none"> ● Dispatcher Job Description ● Comfort Advisor 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 	\$99.95
1023		

	<ul style="list-style-type: none"> • 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 	
1024	<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
1025	<i>Performance Incentive plan - Comfort Advisor</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 for only \$69.95.	\$69.95
1029	<i>Employment Application</i> 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

2. 1-hour part two:

- a. Review how to hire for the customer care and dispatch function.
- b. Review a best practice on training the customer care and dispatch function.
- c. **Subscription provided or purchase these documents:**

Product ID	<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
1026		
1027	<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

#8 How to Stop Lost Profitability by Driving the Business with KPIs

1. 1-hour:

- a. How to tracking business income and expenses.
- b. How to use KPIs to keep your business on the right track.
- c. How to establish individual opportunity conversion & productivity KPIs.
- d. How to establish financial KPIs with rules-based management.
- e. How to calculate your break-even revenue to cover overhead and NPBT.
- f. Review the power of using KPI' to increase profitability.

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

i. N/A

#9 How to Stop Chaos by Organizing the Business for Growth

1. 1-hour:

- h. Residential HVAC Business Must-Do Tasking Functions Review.
- i. Office Admin Department Functions & Organizational Structure.
- j. Sales Department Functions & Organizational Structure.
- k. Service Department Functions & Organizational Structure.
- l. Installation Department Functions & Organizational Structure.
- m. Construction Department Functions & Organizational Structure.

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

Product ID 1028	<i>Residential HVAC Service Contractor Organizational Charts</i> 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 residential HVAC companies should be organized in such a way as to compete competitively.	\$69.95
--------------------------------------	--	----------------

#10 How to Stop Losing Customers via Proper Customer Care Handling

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:**
 - i. **N/A**

#11 How to Stop Losing Financial Control by Forecasting Monthly Labor & Expenses

- 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	
1031	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. 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 Stop Your Inability to Recruit & 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 1030	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
1029	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

#13 How to Stop Guide Operating Chaos with 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 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:**
 - i. **N/A**

Office Manager Job Training Track

Pilot - How to Master a Thriving Residential 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 Manager Job Training Tracks 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.
 - i. N/A

Subscription provided or purchase these documents:

#5 How to Stop Inefficiencies with Proven Work Delivery Standards

1. 1-hour part one:

- e. How to get input and buy-in from all work delivery stakeholders.
- f. Review the business functions that must occur to be in business.
- g. Review why we need written work delivery standards.
- h. Review from a lead to job close out best practice service repair work delivery standards.
- a. **Subscription provided or purchase these documents:**

1015	<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
1018	<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

2. 1-hour part two:

- a. Review from a lead to job close out, best practice written service agreement work delivery standards.

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

Product ID 1016	<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
----------------------------------	--	-----------------

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

- n. Review best practice quality assurance standards.
- o. Review best practice accounts receivable and payable standards.
- p. How to define your credit terms.
- q. Review how to create an accounts receivable aging report.
- r. Review of other best practice account receivable procedures.

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

Product ID 1019	<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
----------------------------------	--	----------------

#7 How to Stop Losing Good People with Proper Hiring & Retention Strategies

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

- a. Review how to implement work delivery standards.
- b. Review how to implement performance-based job descriptions.
- c. Review how to implement labor billable efficiency & productivity monitoring process.
- d. Review how to implement a company culture of success.
- e. Review how performance incentives help achieve business objectives by adhering to a high standard code of conduct.
- f. Review a best practice performance incentive plan for office staff, technicians, selling technicians, and Installers.
- g. Review a best practice performance incentive plan for comfort advisors.

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

Product ID 1023	<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● Comfort Advisor Job Description● Service & Maintenance Technician Job Description● HVAC Installer Job Description● General Manager Job Description	\$99.95
--	---	----------------

	<ul style="list-style-type: none"> • 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 	
1024	<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
1025	<i>Performance Incentive plan - Comfort Advisor</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 for only \$69.95.	\$69.95
1029	<i>Employment Application</i> 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

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

- a. Review how to hire for the customer care and dispatch function.
- b. Review a best practice on training the customer care and dispatch function.

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

Product ID	<i>Customer Care Call Handling Inbound and Outbound Script</i>	
1026	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

1027	<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
-------------	--	----------------

#9 How to Stop Chaos by Organizing the Business for Growth

2. 1-hour:

- o. Residential HVAC Business Must-Do Tasking Functions Review.
- p. Office Admin Department Functions & Organizational Structure.
- q. Sales Department Functions & Organizational Structure.
- r. Service Department Functions & Organizational Structure.
- s. Installation Department Functions & Organizational Structure.
- t. Construction Department Functions & Organizational Structure.
- u. **Subscription provided or purchase these documents:**

Product ID 1028	<i>Residential HVAC Service Contractor Organizational Charts</i> 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 residential HVAC companies should be organized in such a way as to compete competitively.	\$69.95
--------------------------------------	--	----------------

#10 How to Stop Losing Customers via Proper Customer Care Handling

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:**
 - i. **N/A**

#11 How to Stop Losing Financial Control by Forecasting Monthly Labor & Expenses

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	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. 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
1031		

#12 How to Stop Your Inability to Recruit & Retain Top Performers

4. 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**

5. 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	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS	\$69.95

1030	Word format to be printed on your local printer.	
1029	<i>Employment Application</i> 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

6. **1-hour part three:**

- a. Making the Job Offer
- b. Assessing New Hire Training Needs
- c. The Top Reasons Why Continuous Job Training is Necessary
- d. The Coaching Process to Develop the Team and Individuals
- e. The Counseling Process to Change Troublesome Work Behaviors.
- f. **Subscription provided or purchase these documents:**

Product ID 1030	<i>Employee Counseling Form</i> 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 Stop Guide Operating Chaos with 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 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:**
 - i. **N/A**

Receptionist Job Training Track

Pilot - How to Master a Thriving Residential HVAC Service Business

1. 1-hour:

- 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 Manager Job Training Tracks 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 Stop Inefficiencies with Proven Work Delivery Standards

1. 1-hour part one:

- i. How to get input and buy-in from all work delivery stakeholders.
- j. Review the business functions that must occur to be in business.
- k. Review why we need written work delivery standards.
- l. Review from a lead to job close out best practice service repair work delivery standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1015	<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
1018	<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

2. 1-hour part two:

- a. Review from a lead to job close out, best practice written service agreement work delivery standards.
- b. **Subscription provided or purchase these documents:**

Product ID 1016	<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
------------------------	--	-----------------

3. 1-hour part four:

- s. Review best practice quality assurance standards.
- t. Review best practice accounts receivable and payable standards.
- u. How to define your credit terms.
- v. Review how to create an accounts receivable aging report.
- w. Review of other best practice account receivable procedures.

a. Subscription provided or purchase these documents:

Product ID 1019	<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
------------------------	--	----------------

4. 1-hour part five:

- x. Review best practice inventory control standards.
- y. Review effective customer care call handling standards.
- z. Review the customer billing or invoicing requirements.
- aa. Review proven field labor optimization strategies.
- bb. Review how to implement an effective performance monitoring & reporting process.

a. Subscription provided or purchase these documents:

Product ID 1020	<i>Inventory and Tool Control Standard Procedures</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
1021	<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 to Reschedule the Appointment 	\$99.95

Bookkeeper Job Training Track

Pilot - How to Master a Thriving Residential HVAC Service Business

1. 1-hour:

- 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 Manager Job Training Tracks 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 Stop Inefficiencies with Proven Work Delivery Standards

6. 1-hour part one:

- m. How to get input and buy-in from all work delivery stakeholders.
- n. Review the business functions that must occur to be in business.
- o. Review why we need written work delivery standards.
- p. Review from a lead to job close out best practice service repair work delivery standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1015	<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
1018	<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

7. 1-hour part two:

- a. Review from a lead to job close out, best practice written service agreement work delivery standards.
- b. **Subscription provided or purchase these documents:**

Product ID 1016	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
------------------------	---	-----------------

8. 1-hour part three:

- cc. Review from a lead to job close out, best practice written system replacement work delivery standards.
- dd. Creating a Project/Design-Build Statement of Qualifications.
- ee. Example: Cover Letter and Statement of Qualifications.

a. Subscription provided or purchase these documents:

Product ID 1017	System Replacement 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
------------------------	---	-----------------

9. 1-hour part four:

- ff. Review best practice quality assurance standards.
- gg. Review best practice accounts receivable and payable standards.
- hh. How to define your credit terms.
- ii. Review how to create an accounts receivable aging report.
- jj. Review of other best practice account receivable procedures.

a. Subscription provided or purchase these documents:

Product ID 1019	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
------------------------	---	----------------

10. 1-hour part five:

- kk. Review best practice inventory control standards.
- ll. Review effective customer care call handling standards.
- mm. Review the customer billing or invoicing requirements.
- nn. Review proven field labor optimization strategies.
- oo. Review how to implement an effective performance monitoring & reporting process.

a. Subscription provided or purchase these documents:

Product ID 1020	Inventory and Tool Control Standard Procedures 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

<p>1021</p>	<p><i>Effective Customer Care Call Handling Standard Procedures</i></p> <p>Arming the dispatcher with a professional standardized way to great and respond to customer inquiries to include:</p> <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 to Reschedule the Appointment 	<p>\$99.95</p>
--------------------	---	-----------------------

Accounting Job Training Track

Pilot - How to Master a Thriving Residential 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 Manager Job Training Tracks 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 Stop Inefficiencies with Proven Work Delivery Standards

11. 1-hour part one:

- q. How to get input and buy-in from all work delivery stakeholders.
- r. Review the business functions that must occur to be in business.
- s. Review why we need written work delivery standards.
- t. Review from a lead to job close out best practice service repair work delivery standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1015	<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
1018	<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

12. 1-hour part two:

- a. Review from a lead to job close out, best practice written service agreement work delivery standards.

b. Subscription provided or purchase these documents:

Product ID 1016	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
----------------------------------	---	-----------------

13. 1-hour part three:

pp. Review from a lead to job close out, best practice written system replacement work delivery standards.

qq. Creating a Project/Design-Build Statement of Qualifications.

rr. Example: Cover Letter and Statement of Qualifications.

a. Subscription provided or purchase these documents:

Product ID 1017	System Replacement 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
----------------------------------	---	-----------------

14. 1-hour part four:

ss. Review best practice quality assurance standards.

tt. Review best practice accounts receivable and payable standards.

uu. How to define your credit terms.

vv. Review how to create an accounts receivable aging report.

ww. Review of other best practice account receivable procedures.

a. Subscription provided or purchase these documents:

Product ID 1019	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
----------------------------------	---	----------------

15. 1-hour part five:

xx. Review best practice inventory control standards.

yy. Review effective customer care call handling standards.

zz. Review the customer billing or invoicing requirements.

aaa. Review proven field labor optimization strategies.

bbb. Review how to implement an effective performance monitoring & reporting process.

a. Subscription provided or purchase these documents:

Product ID 1020	Inventory and Tool Control Standard Procedures 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	\$99.95
----------------------------------	---	----------------

	your local printer.	
Product ID 1021	Effective Customer Care Call Handling Standard Procedures Arming the dispatcher with a professional standardized way to great 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 to Reschedule the Appointment 	\$99.95

#8 How to Stop Lost Profitability by Driving the Business with KPIs

1. 1-hour:
 - a. How to tracking business income and expenses.
 - b. How to use KPIs to keep your business on the right track.
 - c. How to establish individual opportunity conversion & productivity KPIs.
 - d. How to establish financial KPIs with rules-based management.
 - e. How to calculate your break-even revenue to cover overhead and NPBT.
 - f. Review the power of using KPI' to increase profitability.
 - g. **Subscription provided or purchase these documents:**
 - i. N/A

#11 How to Stop Losing Financial Control by Forecasting Monthly Labor & Expenses

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.

Subscription provided or purchase these documents: #11 How to Stop Losing Financial Control by Forecasting Monthly Labor & Expenses

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 1031	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	\$159.95
--	---	-----------------

	<p>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. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.</p>	
--	---	--

#13 How to Stop Guide Operating Chaos with 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 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:**
 - i. **N/A**

Service Manager Job Training Track

Pilot - How to Master a Thriving Residential HVAC Service Business

5. 1-hour:

- 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 Manager Job Training Tracks 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 Stop UnderPricing Your Services to Make a Fair Profit

1. 1-hour part-two:

- a. Step #1 - Determining your flat rate repair hourly truck and travel cost rate.
- b. Step #2 - Determining your flat rate hourly technician costs rate.
- c. Step #3 - Determining your repair warranty support cost rate.
- d. Step #4 - Determine your monthly and annual service agreement cost rate for the first unit and adder per additional unit in the same location.
- e. **Subscription provided or purchase these documents:**

Product ID 1003	Technician/Installer Onsite Hourly and Truck and Travel hourly 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
----------------------------------	--	----------------

2. 1-hour part-three:

- a. Review best practice upfront flat rate system replacement price guide.
- b. Step #1 - Determining your flat rate replacement hourly onsite truck and travel cost rate.
- c. Step #2 - Determining your flat rate replacement 2-man crew labor cost rate.
- d. Step #3 - Determining your flat rate replacement warranty support cost rate.
- e. **Subscription provided or purchase these documents:**

#2 How to Stop Missing Your Fair Share of Service Opportunities

1. 1-hour part two:

- a. Review onsite opportunity assessment forms by transaction type.
- b. Why and how to ask a logical set of repair call questions.

- c. How to harvest post-call needs attention items found on the repair check-out opportunity assessment survey form.
- d. Review of the 37-common opportunity items you can capture that still “need attention”.
- e. **Subscription provided or purchase these documents:**

Product ID	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
1004		
1005	Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms – Multi-Form access to print vendor 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. Access to print vendor included in Complete Appendix B Documentation Set.	Order from Print Vendor

2. 1-hour part three:

- a. Review the onsite system replacement opportunity assessment form.
- b. Review the Installed-Right Solution Survey form.
- c. Review the system condition survey form.
- d. Learn how to use the duct & flue tables to verify ductwork capacities.
- e. Review the inside equipment survey form.
- f. Review the outside equipment survey form.
- g. **Subscription provided or purchase these documents:**

Product ID	Onsite System Replacement Opportunity Assessment Form The On-site System Replacement Opportunity Assessment Survey Form assists the Selling Technician or Comfort Advisor to identify the transaction and scope of work and communicate that their company is the best choice to	
-------------------	--	--

1006	<p>do the job. Installed-Right objectives are to help the Selling Technician or Comfort Advisor:</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. <p>To provide the means to complete the sales call and close the transaction in 1 sales call.</p>	\$99.95
-------------	--	----------------

#5 How to Stop Inefficiencies with Proven Work Delivery Standards

16. 1-hour part one:

- u. How to get input and buy-in from all work delivery stakeholders.
- v. Review the business functions that must occur to be in business.
- w. Review why we need written work delivery standards.
- x. Review from a lead to job close out best practice service repair work delivery standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1015	<p><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.</p>	\$159.95
1018	<p><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.</p>	\$159.95

17. 1-hour part two:

- a. Review from a lead to job close out, best practice written service agreement work delivery standards.
- b. **Subscription provided or purchase these documents:**

Product ID 1016	<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
------------------------	--	-----------------

18. 1-hour part three:

- ccc. Review from a lead to job close out, best practice written system replacement work delivery standards.
- ddd. Creating a Project/Design-Build Statement of Qualifications.
- eee. Example: Cover Letter and Statement of Qualifications.

a. Subscription provided or purchase these documents:

Product ID 1017	<i>System Replacement Work Delivery Standard Procedures</i> 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
------------------------	--	-----------------

19. 1-hour part four:

- fff. Review best practice quality assurance standards.
- ggg. Review best practice accounts receivable and payable standards.
- hhh. How to define your credit terms.
- iii. Review how to create an accounts receivable aging report.
- jjj. Review of other best practice account receivable procedures.

a. Subscription provided or purchase these documents:

Product ID 1019	<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
------------------------	--	----------------

20. 1-hour part five:

- kkk. Review best practice inventory control standards.
- lll. Review effective customer care call handling standards.
- mmm. Review the customer billing or invoicing requirements.
- nnn. Review proven field labor optimization strategies.
- ooo. Review how to implement an effective performance monitoring & reporting process.

a. Subscription provided or purchase these documents:

Product ID 1020	<i>Inventory and Tool Control Standard Procedures</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
	<i>Effective Customer Care Call Handling Standard Procedures</i>	

1021	<p>Arming the dispatcher with a professional standardized way to greet and respond to customer inquiries to include:</p> <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 to Reschedule the Appointment 	\$99.95
-------------	--	----------------

#6 How to Stop No Pay & Business Risk with Proper Terms & Conditions

2. 1-hour:

- Review how your invoice or proposal agreement is a business contract.
- Review service repair payment & liability protection terms & conditions.
- Service agreement payment & liability protection terms & conditions.
- System replacement payment & liability protection terms & conditions.
- Subscription provided or purchase these documents:**

Product ID	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i>	
1022	<ul style="list-style-type: none"> • 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 Stop Losing Good People with Proper Hiring & Retention Strategies

1. 1-hour:

- Review how to implement work delivery standards.
- Review how to implement performance-based job descriptions.
- Review how to implement labor billable efficiency & productivity monitoring process.
- Review how to implement a company culture of success.
- Review how performance incentives help achieve business objectives by adhering to a high standard code of conduct.
- Review a best practice performance incentive plan for office staff, technicians, selling technicians, and Installers.
- Review a best practice performance incentive plan for comfort advisors.
- Subscription provided or purchase these documents:**

Product ID	<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 • Comfort Advisor 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
1023		
1024	<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
1025	<i>Performance Incentive plan - Comfort Advisor</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 for only \$69.95.	\$69.95
1029	<i>Employment Application</i> 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

#8 How to Stop Lost Profitability by Driving the Business with KPIs

2. 1-hour:

- How to tracking business income and expenses.
- How to use KPIs to keep your business on the right track.

- c. How to establish individual opportunity conversion & productivity KPIs.
- d. How to establish financial KPIs with rules-based management.
- e. How to calculate your break-even revenue to cover overhead and NPBT.
- f. Review the power of using KPI' to increase profitability.
- g. **Subscription provided or purchase these documents:**
 - i. N/A

#9 How to Stop Chaos by Organizing the Business for Growth

3. 1-hour:

- v. Residential HVAC Business Must-Do Tasking Functions Review.
- w. Office Admin Department Functions & Organizational Structure.
- x. Sales Department Functions & Organizational Structure.
- y. Service Department Functions & Organizational Structure.
- z. Installation Department Functions & Organizational Structure.
- aa. Construction Department Functions & Organizational Structure.
- bb. **Subscription provided or purchase these documents:**

Product ID	<i>Residential HVAC Service Contractor Organizational Charts</i>	
1028	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 residential HVAC companies should be organized in such a way as to compete competitively.	\$69.95

#10 How to Stop Losing Customers via Proper Customer Care Handling

3. 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:**

i. N/A

#11 How to Stop Losing Financial Control by Forecasting Monthly Labor & Expenses

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	BudgetPro Annual & Monthly Budgeting Calculator	
1031	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. 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 Stop Your Inability to Recruit & Retain Top Performers

7. 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

8. 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 1030	<i>Employee Counseling Form</i> 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
1029	<i>Employment Application</i> 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

- i. Human Resource Manager Job Training Tracks

#13 How to Stop Guide Operating Chaos with 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 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:**
 - i. **N/A**

Dispatcher/Customer Care Manager Job Training Track

Pilot - How to Master a Thriving Residential 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 Manager Job Training Tracks 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 Stop Inefficiencies with Proven Work Delivery Standards

21. 1-hour part one:

- y. How to get input and buy-in from all work delivery stakeholders.
- z. Review the business functions that must occur to be in business.
- aa. Review why we need written work delivery standards.
- bb. Review from a lead to job close out best practice service repair work delivery standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1015	<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
1018	<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

22. 1-hour part two:

- a. Review from a lead to job close out, best practice written service agreement work delivery standards.
- b. **Subscription provided or purchase these documents:**

Product ID 1016	<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
------------------------	--	-----------------

23. 1-hour part three:

- ppp. Review from a lead to job close out, best practice written system replacement work delivery standards.
- qqq. Creating a Project/Design-Build Statement of Qualifications.
- rrr. Example: Cover Letter and Statement of Qualifications.

- a. **Subscription provided or purchase these documents:**

Product ID 1017	<i>System Replacement Work Delivery Standard Procedures</i> 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
------------------------	--	-----------------

Installation/Construction Manager Job Training Track

Pilot - How to Master a Thriving Residential HVAC Service Business

1. 1-hour:

- 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 Manager Job Training Tracks 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 Stop UnderPricing Your Services to Make a Fair Profit

21. 1-hour part-three:

- a. Review best practice upfront flat rate system replacement price guide.
- b. Step #1 - Determining your flat rate replacement hourly onsite truck and travel cost rate.
- c. Step #2 - Determining your flat rate replacement 2-man crew labor cost rate.
- d. Step #3 - Determining your flat rate replacement warranty support cost rate.
- e. **Subscription provided or purchase these documents:**

Product ID 1003	Technician/Installer Onsite Hourly and Truck and Travel hourly 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
--------------------------------------	--	----------------

#5 How to Stop Inefficiencies with Proven Work Delivery Standards

1. 1-hour part four:

- a. Review best practice quality assurance standards.
- b. Review best practice accounts receivable and payable standards.
- c. How to define your credit terms.
- d. Review how to create an accounts receivable aging report.
- e. Review of other best practice account receivable procedures.
- a. **Subscription provided or purchase these documents:**

Product ID 1019	<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
------------------------	--	----------------

2. 1-hour part five:

- a. Review best practice inventory control standards.
- b. Review effective customer care call handling standards.
- c. Review the customer billing or invoicing requirements.
- d. Review proven field labor optimization strategies.
- e. Review how to implement an effective performance monitoring & reporting process.

a. Subscription provided or purchase these documents:

Product ID 1020	<i>Inventory and Tool Control Standard Procedures</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
1021	<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 to Reschedule the Appointment 	\$99.95

#7 How to Stop Losing Good People with Proper Hiring & Retention Strategies

1. 1-hour part one:

- a. Review how to implement work delivery standards.
- b. Review how to implement performance-based job descriptions.
- c. Review how to implement labor billable efficiency & productivity monitoring process.
- d. Review how to implement a company culture of success.
- e. Review how performance incentives help achieve business objectives by adhering to a high standard code of conduct.
- f. Review a best practice performance incentive plan for office staff, technicians, selling technicians, and Installers.
- g. Review a best practice performance incentive plan for comfort advisors.
- h. **Subscription provided or purchase these documents:**

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:	
1023	<ul style="list-style-type: none"> • Dispatcher Job Description • Comfort Advisor 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
1024	Performance Incentive plan - Office, Technicians & Installer 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
1025	Performance Incentive plan - Comfort Advisor Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer for only \$69.95.	\$69.95
1029	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

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

- Review how to hire for the customer care and dispatch function.
- Review a best practice on training the customer care and dispatch function.

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

Product ID	<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
1026		
1027	<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

#8 How to Stop Lost Profitability by Driving the Business with KPIs

1. **1-hour:**

- How to tracking business income and expenses.
- How to use KPIs to keep your business on the right track.
- How to establish individual opportunity conversion & productivity KPIs.
- How to establish financial KPIs with rules-based management.
- How to calculate your break-even revenue to cover overhead and NPBT.
- Review the power of using KPI' to increase profitability.

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

- N/A

#9 How to Stop Chaos by Organizing the Business for Growth

1. **1-hour:**

- Residential HVAC Business Must-Do Tasking Functions Review.
- Office Admin Department Functions & Organizational Structure.
- Sales Department Functions & Organizational Structure.
- Service Department Functions & Organizational Structure.
- Installation Department Functions & Organizational Structure.
- Construction Department Functions & Organizational Structure.

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

Product ID 1028	Residential 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 residential HVAC companies should be organized in such a way as to compete competitively.	\$69.95
--------------------------------------	---	----------------

#10 How to Stop Losing Customers via Proper Customer Care Handling

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:**
 - i. **N/A**

#11 How to Stop Losing Financial Control by Forecasting Monthly Labor & Expenses

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 1031	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. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. Provided in MS Excel format.	\$159.95
--------------------------------------	--	-----------------

#12 How to Stop Your Inability to Recruit & Retain Top Performers

1. 1-hour part three:

- a. Making the Job Offer
- b. Assessing New Hire Training Needs
- c. The Top Reasons Why Continuous Job Training is Necessary
- d. The Coaching Process to Develop the Team and Individuals
- e. The Counseling Process to Change Troublesome Work Behaviors.
- f. **Subscription provided or purchase these documents:**

Product ID 1030	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 Stop Guide Operating Chaos with 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 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:**
 - i. **N/A**

Comfort Advisor Job Training Track

Pilot - How to Master a Thriving Residential HVAC Service Business

1. 1-hour:

- 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 Manager Job Training Tracks 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 Stop UnderPricing Your Services to Make a Fair Profit

2. 1-hour part-three:

- a. Review best practice upfront flat rate system replacement price guide.
- b. Step #1 - Determining your flat rate replacement hourly onsite truck and travel cost rate.
- c. Step #2 - Determining your flat rate replacement 2-man crew labor cost rate.
- d. Step #3 - Determining your flat rate replacement warranty support cost rate.
- e. **Subscription provided or purchase these documents:**

Product ID 1003	Technician/Installer Onsite Hourly and Truck and Travel hourly 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
----------------------------------	--	----------------

f.

#2 How to Stop Missing Your Fair Share of Service Opportunities

1. 1-hour part three:

- a. Review the onsite system replacement opportunity assessment form.
- b. Review the Installed-Right Solution Survey form.
- c. Review the system condition survey form.
- d. Learn how to use the duct & flue tables to verify ductwork capacities.
- e. Review the inside equipment survey form.
- f. Review the outside equipment survey form.
- g. **Subscription provided or purchase these documents:**

Product ID	Onsite System Replacement Opportunity Assessment Form The On-site System Replacement Opportunity Assessment Survey Form assists the Selling Technician or Comfort Advisor to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right objectives are to help the Selling Technician or Comfort Advisor:	
1006	<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. <p>To provide the means to complete the sales call and close the transaction in 1 sales call.</p>	\$99.95

#4 How to Stop Selling and Start Consulting & Telling

1. 1-hour part three:

- u. Review the system replacement business.
- v. Review of proactive trust-selling system replacement standards.
- w. **Subscription provided or purchase these documents:**

Product ID	Proactive Replacement Trust-Selling Standards Procedures The selling technician and comfort advisors use this selling standard procedure to perform the step-by-step functions of professional project/design-build sales and operations from a lead to booking a sold replacement job. This document is provided in original MS Word, Excel, PowerPoint, and Acrobat PDF format to be printed on your local printer.	\$99.95
1010	Replacement Sales Presentation (This is included in our Home Comfort Falat Rate Price Guide) This promotional tool is used by selling technicians and comfort advisors on a request for 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-installation, and (5) Investment Option Price Sheet to provide an upfront itemize and logical installation sequence and price to the customer. This promotional contract is provided in original MS PowerPoint format to be printed on your local printer.	\$99.95

#5 How to Stop Inefficiencies with Proven Work Delivery Standards

1. 1-hour part three:

sss. Review from a lead to job close out, best practice written system replacement work delivery standards.

ttt. Creating a Project/Design-Build Statement of Qualifications.

uuu. Example: Cover Letter and Statement of Qualifications.

a. Subscription provided or purchase these documents:

Product ID 1017	<i>System Replacement Work Delivery Standard Procedures</i> 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
----------------------------------	--	-----------------

#6 How to Stop No Pay & Business Risk with Proper Terms & Conditions

1. 1-hour:

- Review how your invoice or proposal agreement is a business contract.
- Review service repair payment & liability protection terms & conditions.
- Service agreement payment & liability protection terms & conditions.
- System replacement payment & liability protection terms & conditions.

e. Subscription provided or purchase these documents:

Product ID 1022	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i> <ul style="list-style-type: none">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 Stop Losing Good People with Proper Hiring & Retention Strategies

1. 1-hour part one:

- Review how to implement work delivery standards.
- Review how to implement performance-based job descriptions.
- Review how to implement labor billable efficiency & productivity monitoring process.
- Review how to implement a company culture of success.
- Review how performance incentives help achieve business objectives by adhering to a high standard code of conduct.
- Review a best practice performance incentive plan for office staff, technicians, selling technicians, and Installers.

g. Review a best practice performance incentive plan for comfort advisors.

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

Product ID	<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 • Comfort Advisor 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
1023		
1024	<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
1025	<i>Performance Incentive plan - Comfort Advisor</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 for only \$69.95.	\$69.95
1029	<i>Employment Application</i> 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

4. 1-hour part three:

a. Review the onsite system replacement opportunity assessment form.

b. Review the Installed-Right Solution Survey form.

- c. Review the system condition survey form.
- d. Learn how to use the duct & flue tables to verify ductwork capacities.
- e. Review the inside equipment survey form.
- f. Review the outside equipment survey form.

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

<p>Product ID</p> <p>1006</p>	<p><i>Onsite System Replacement Opportunity Assessment Form</i></p> <p>The On-site System Replacement Opportunity Assessment Survey Form assists the Selling Technician or Comfort Advisor to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right objectives are to help the Selling Technician or Comfort Advisor:</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. <p>To provide the means to complete the sales call and close the transaction in 1 sales call.</p>	<p>\$99.95</p>
---	--	-----------------------

Selling Technician Job Training Track

Pilot - How to Master a Thriving Residential HVAC Service Business

1. 1-hour:

- 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 Manager Job Training Tracks 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 Stop UnderPricing Your Services to Make a Fair Profit

1. 1-hour part-one:

- a. Selling based on value - not price
- b. Get paid for the 90% of the value you are bringing to the job.
- c. Why Upfront Flat Rate Pricing is Needed.
- d. Upfront flat-rate repairs best practice price guide format.
- e. **Subscription provided or purchase these documents:**

Product ID	Fix-Right Flat-Rate Price Guide You can order the Fix-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/Month To \$79.95/Month
Product ID	Three Upfront Flat-Rate Price Guide Set – Repair, Replacement & Ductless Mini-Split You can order the Fix-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. 	\$39.95/Month To \$79.95/Month

- d. Learn how to use the duct & flue tables to verify ductwork capacities.
- e. Review the inside equipment survey form.
- f. Review the outside equipment survey form.
- g. **Subscription provided or purchase these documents:**
 - i. General Manager Job Training Tracks
 - ii. Operations Manager Job Training Tracks
 - iii. Service Manager Job Training Tracks
 - iv. Sales Manager Job Training Tracks
 - v. Comfort Advisors
 - vi. Selling Technicians

4 How to Stop Selling and Start Consulting & Telling

1. 1-hour part one:

- a. Review the 4-Steps of the consultative trust selling approach.
- b. Review why you need to standardize the service call handling process.
- c. Review why business growth & sustainability depends on selling service agreements.
- d. Review proactive repair trust-selling standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1007	<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
------------------------	---	----------------

2. 1-hour part two:

- e. Understanding the Service Agreement Business.
- f. Review of the many customer benefits of a service agreement.
- g. Review the many company operating and business value benefits of service agreements.
- h. Review customer service agreement expectations.
- i. Review proactive service agreement trust-selling standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1008	<i>Proactive Service Agreement Sales Call Handling Tasking Procedures</i> Service managers, selling technicians and technicians use this standard procedure document to perform the step-by-step procedures of a professional service agreement call handling 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
------------------------	--	----------------

3. 1-hour part three:

- a. Review the system replacement business.
- b. Review of proactive trust-selling system replacement standards.
- c. **Subscription provided or purchase these documents:**

Product ID 1009	<i>Proactive Replacement Trust-Selling Standards Procedures</i> The selling technician and comfort advisors use this selling standard procedure to perform the step-by-step functions of professional project/design-build sales and operations from a lead to booking a sold replacement job. This document is provided in original MS Word, Excel, PowerPoint, and Acrobat PDF format to be printed on your local printer.	\$99.95
1010	<i>Replacement Sales Presentation (This is included in our Home Comfort Falat Rate Price Guide</i> This promotional tool is used by selling technicians and comfort advisors on a request for 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-installation, and (5) Investment Option Price Sheet to provide an upfront itemize and logical installation sequence and price to the customer. This promotional contract is provided in original MS PowerPoint format to be printed on your local printer.	\$99.95
1011	<i>HVAC System Replacement Proposal Agreement</i> Selling technicians and comfort advisors use this promotional and system replacement transaction contract. This document is multi-form; this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	<i>Order from Print Vendor</i>
1012	<i>Ductless Mini-Split-System Replacement Proposal Agreement</i> Selling technicians and comfort advisors use this promotional and system replacement transaction contract. This document is multi-form; this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	<i>Order from Print Vendor</i>
1013	<i>Boiler System Replacement Proposal Agreement</i> Selling technicians and comfort advisors use this promotional and system replacement transaction contract. This document is multi-form; this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	<i>Order from Print Vendor</i>
1014	<i>Protect Service Agreement</i> Access to print vendor included in Complete Appendix B Documentation Set. Technicians use this promotional and maintenance transaction contract. This document is multi-form, and this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	<i>Order from Print Vendor</i>
1032	<i>Which Contractor Best Meets Your Needs Questionnaire in MS Excel</i> Typically, when a customer does not sign, obtain the Which Contractor Best Meets Your Needs? Introduce this 20-questionnaire to the customer as a courtesy to our clients. This questionnaire helps the customer not get	\$99.95

	damaged by using an unworthy contractor. Nine out of ten times, the customer will not even get past the first five questions. For example, question 4 asks, “Do you perform drug testing to screen employees for hire?”. Simply explain to the customer the following. Suppose a contractor comes on your property with an employee under the influence of drugs and gets hurt. In that case, they can sue you personally for allowing them to work on your property stoned. Ouch. Why is this an important question to ask? As proof, when contractors recruit technicians and installers applicants for hire and tell applicants that drug testing is required, only 6 out of 10 applicants return.	
--	---	--

#5 How to Stop Inefficiencies with Proven Work Delivery Standards

24. 1-hour part one:

- cc. How to get input and buy-in from all work delivery stakeholders.
- dd. Review the business functions that must occur to be in business.
- ee. Review why we need written work delivery standards.
- ff. Review from a lead to job close out best practice service repair work delivery standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1015	<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
1018	<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

25. 1-hour part two:

- a. Review from a lead to job close out, best practice written service agreement work delivery standards.
- b. **Subscription provided or purchase these documents:**

Product ID 1016	<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
----------------------------------	--	-----------------

26. 1-hour part three:

vvv. Review from a lead to job close out, best practice written system replacement work delivery standards.

www. Creating a Project/Design-Build Statement of Qualifications.

xxx. Example: Cover Letter and Statement of Qualifications.

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

Product ID 1017	<i>System Replacement Work Delivery Standard Procedures</i> 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
----------------------------------	--	-----------------

#6 How to Stop No Pay & Business Risk with Proper Terms & Conditions

3. **1-hour:**

- Review how your invoice or proposal agreement is a business contract.
- Review service repair payment & liability protection terms & conditions.
- Service agreement payment & liability protection terms & conditions.
- System replacement payment & liability protection terms & conditions.

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

Product ID 1022	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i> <ul style="list-style-type: none">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 Stop Losing Good People with Proper Hiring & Retention Strategies

5. **1-hour part one:**

- Review how to implement work delivery standards.
- Review how to implement performance-based job descriptions.
- Review how to implement labor billable efficiency & productivity monitoring process.
- Review how to implement a company culture of success.
- Review how performance incentives help achieve business objectives by adhering to a high standard code of conduct.
- Review a best practice performance incentive plan for office staff, technicians, selling technicians, and Installers.
- Review a best practice performance incentive plan for comfort advisors.

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

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: <ul style="list-style-type: none"> • Dispatcher Job Description • Comfort Advisor 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
1023		
1024	Performance Incentive plan - Office, Technicians & Installer 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
1025	Performance Incentive plan - Comfort Advisor Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer for only \$69.95.	\$69.95
1029	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

Lead Technician/Technician Job Training Track

Pilot - How to Master a Thriving Residential 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 Manager Job Training Tracks 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. General Manager Job Training Tracks
 - ii. Operations Manager Job Training Tracks
 - iii. Sales Manager Job Training Tracks
 - iv. Service Manager Job Training Tracks
 - v. Installation Manager Job Training Tracks

#1 How to Stop Underpricing Your Services to Make a Fair Profit

1. 1-hour part-one:

- a. Selling based on value - not price
- b. Get paid for the 90% of the value you are bringing to the job.
- c. Why Upfront Flat Rate Pricing is Needed.
- d. Upfront flat-rate repairs best practice price guide format.

Subscription provided or purchase these documents: Pilot - How to Master a Thriving Residential HVAC Service Business

1. 1-hour:

- 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 Manager Job Training Tracks 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 Stop UnderPricing Your Services to Make a Fair Profit

1. 1-hour part-one:

- a. Selling based on value - not price
- b. Get paid for the 90% of the value you are bringing to the job.
- c. Why Upfront Flat Rate Pricing is Needed.
- d. Upfront flat-rate repairs best practice price guide format.
- e. **Subscription provided or purchase these documents:**

Product ID	Fix-Right Flat-Rate Price Guide You can order the Fix-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:	\$39.95/Month To \$79.95/Month
1001	<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. 	
1002	<i>Three Upfront Flat-Rate Price Guide Set – Repair, Replacement & Ductless Mini-Split</i> You can order the Fix-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/Month To \$79.95/Month

#2 How to Stop Missing Your Fair Share of Service Opportunities

1. 1-hour part two:

- a. Review onsite opportunity assessment forms by transaction type.
- b. Why and how to ask a logical set of repair call questions.
- c. How to harvest post-call needs attention items found on the repair check-out opportunity assessment survey form.
- d. Review of the 37-common opportunity items you can capture that still “need attention”.
- e. **Subscription provided or purchase these documents:**
 - i. General Manager Job Training Tracks

- ii. Operations Manager Job Training Tracks
- iii. Service Manager Job Training Tracks
- iv. Sales Manager Job Training Tracks
- v. Selling Technicians
- vi. Technicians

#4 How to Stop Selling and Start Consulting & Telling

1. 1-hour part two:

- a. Understanding the Service Agreement Business.
- b. Review of the many customer benefits of a service agreement.
- c. Review the many company operating and business value benefits of service agreements.
- d. Review customer service agreement expectations.
- e. Review proactive service agreement trust-selling standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1008	<i>Proactive Service Agreement Sales Call Handling Tasking Procedures</i> Service managers, selling technicians and technicians use this standard procedure document to perform the step-by-step procedures of a professional service agreement call handling 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
------------------------	--	----------------

#5 How to Stop Inefficiencies with Proven Work Delivery Standards

1. 1-hour part one:

- a. How to get input and buy-in from all work delivery stakeholders.
- b. Review the business functions that must occur to be in business.
- c. Review why we need written work delivery standards.
- d. Review from a lead to job close out best practice service repair work delivery standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1015	<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
1018	<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	\$159.95

	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.	
--	--	--

2. 1-hour part two:

- a. Review from a lead to job close out, best practice written service agreement work delivery standards.

b. Subscription provided or purchase these documents:

Product ID 1016	<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
--------------------------------------	--	-----------------

#6 How to Stop No Pay & Business Risk with Proper Terms & Conditions

1. 1-hour:

- a. Review how your invoice or proposal agreement is a business contract.
- b. Review service repair payment & liability protection terms & conditions.
- c. Service agreement payment & liability protection terms & conditions.
- d. System replacement payment & liability protection terms & conditions.

e. Subscription provided or purchase these documents:

Product ID 1022	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i> <ul style="list-style-type: none"> 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
--------------------------------------	---	----------------

Human Resource Manager Job Training Track

Pilot - How to Master a Thriving Residential HVAC Service Business

1. 1-hour:

- 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 Manager Job Training Tracks 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 Stop Losing Good People with Proper Hiring & Retention Strategies

1. 1-hour part one:

- a. Review how to implement work delivery standards.
- b. Review how to implement performance-based job descriptions.
- c. Review how to implement labor billable efficiency & productivity monitoring process.
- d. Review how to implement a company culture of success.
- e. Review how performance incentives help achieve business objectives by adhering to a high standard code of conduct.
- f. Review a best practice performance incentive plan for office staff, technicians, selling technicians, and Installers.
- g. Review a best practice performance incentive plan for comfort advisors.
- h. **Subscription provided or purchase these documents:**

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: <ul style="list-style-type: none">• Dispatcher Job Description• Comfort Advisor 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	
1023		\$99.95

	<ul style="list-style-type: none"> • 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 	
1024	<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
1025	<i>Performance Incentive plan - Comfort Advisor</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 for only \$69.95.	\$69.95
1029	<i>Employment Application</i> 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

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

- Review how to hire for the customer care and dispatch function.
- Review a best practice on training the customer care and dispatch function.
- Subscription provided or purchase these documents:**

Product ID	<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
1026		
1027	<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	\$69.95

	email. This document is provided in original MS Word format to be printed on your local printer.	
--	--	--

#10 How to Stop Losing Customers via Proper Customer Care Handling

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:**
 - i. **N/A**

#12 How to Stop Your Inability to Recruit & 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 1030	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
------------------------	---	----------------

1029	<i>Employment Application</i> 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
-------------	---	----------------

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

- a. Making the Job Offer
- b. Assessing New Hire Training Needs
- c. The Top Reasons Why Continuous Job Training is Necessary
- d. The Coaching Process to Develop the Team and Individuals
- e. The Counseling Process to Change Troublesome Work Behaviors.
- f. **Subscription provided or purchase these documents:**

<i>Product ID</i> 1030	<i>Employee Counseling Form</i> 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
---	--	----------------

#14 How to 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:**
 - i. **N/A**

Wendell Bedell, President/CEO, Biography



Founded 2021 HVACPro Podcast

Founded 2019 Join HVAC Succes

Founded 2001 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 marketing, sales, and general-service management publications.

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. He has over 25 years of experience as a proven Sales and Marketing manager developing successful residential and commercial-industrial building systems and service businesses.

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, residential 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 in Business Administration from the University of Hartford (1990), a Bachelor in Business Management, Westfield State College (1987), and an Associate in Industrial Electronics, New Hampshire Technical College (1981).