

THE ULTIMATE HVAC CONTRACTOR

SUCCESS MANUAL & READY-BUILT HVAC USER GUIDE

This recipe for success has doubled, tripled, and even quadrupled
REVENUES AND PROFITS of many hundreds of other HVAC
businesses just like yours.

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The Ultimate HVAC Contracting Success Manual

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E-Book learning objectives

We find it hard to keep watching businesses like yours **Struggle for Sustainability**, instead of aggressively **Growing and Thriving**.

Here's how this The Ultimate HVAC Contracting Success Manual E-Book training can help your business Consistently Profitably Grow:

- Following this Ready-Built HVAC Contractor Business Systems **recipe for success** has doubled, tripled, and even quadrupled REVENUES AND PROFITS of many hundreds of other HVAC businesses just like yours.
- You will be able to hone in on what's holding you back from success.
- The method is based on 20+ years of experience in HVAC business development.

Here's what we want you to remember

Whether you are a 1 truck or a 200 truck operation, successful HVAC companies recognized the need to have implemented systems and procedures.

This series of trainings is intentionally broken down into easy to consume sessions, so that you and your staff have the opportunity to give each one the thought and consideration your HVAC business deserves. Over the next few weeks, you'll see real world examples and expert HVAC instructors.

Who should read this e-Book

Owners, managers and lead staff members.

What you can expect

Within a very short while, you'll be looking at your business systems and processes in a very different light. I'm will be as excited as you to hear about how this series has positively impacted your HVAC business!

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FREE HVAC Consulting Hotline

Let's get organized in 2016! Call me directly if you wish a private online demo of any aspect of the business processes present in this The Ultimate HVAC Contracting Success Manual e-Book.

Wendell Bedell

HVAC Business Fitness Coach

603-557-1611 Direct

wendellb@GrowMyHVAC.com

www.GrowMyHVAC.com

Intro to HVAC contracting industry situation

To work for yourself, to be your own boss, to run your own HVAC business – for many these phrases describe the American dream. Becoming a successful HVAC business owner, however, is not an easy task. It requires skill, motivation, hard work, and good luck. It also requires HVAC business operating information in large measure. The HVAC business owner stands on the brink of a fantastic future with a thousand HVAC related business questions that need answers.

The Ready-Built HVAC Client Solutions Training Center provides the business answers and have helped hundreds of HVAC business owners and managers unleash the power and the potential of proven online business management, systems, processes and individual job staff training. Ready-Built HVAC Client Solutions Training Center has helped hundreds of HVAC businesses become more customer focused, company profit focused and employee focused resulting in performance-driven organizations.

Unfortunately, census data shows that 40 out of 100 HVAC businesses fail within the first year and 80 fail within first five years and 80% of the ones that do survive, fail over the next 5.

Why is this? Why do so many HVAC people go into business, only to fail?

The main contributing factor to such high business failure rates is simply the HVAC industry's **poor profitability** of only a dismal 2.3% net profit before taxes. You are not alone, not that it's any kind of a consolation prize, but 97% of all service contractor trade groups experience the same dismal 2.3% net profit.

So what are the causes of such poor profitability in the HVAC contracting industry?

Here are the top 8 business reasons of poor profitability: See Figure 1 below which illustrates this Poor Profitability's "Leaky HVAC Business Profit Bucket".

1. Poor or no lead generation – no or poor internet presence or poor call handling
2. Under-pricing as a primary closing mechanism--for service & replacement work

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3. Absence of defined selling - low close rates 35% and less
4. Absence of defined work delivery - Low close rates 35% and less
5. Poor labor productivity management
6. Don't motivate their staff right
7. Poor financial management skills, business mix tracking

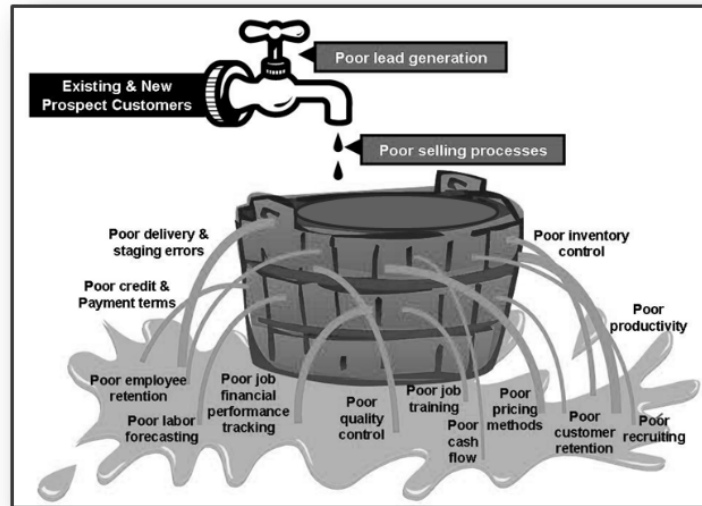


Figure 1. Leaky HVAC Business Profit Bucket
Source: Building Services Institute 30% NPBT Webinar

So what does success look like

Whether you are a one-person operation or a 200 truck company, successful companies have implemented systems and procedures.

This is what successful HVAC companies look like.

They experience consistent profitable growth

Residential contractor achieve:

- 2 out of 10 service calls converted to quoted work
- 8 out of 10 non service agreement customer calls converted to service agreement
- 8 out 10 replacements sold on a catastrophic repair call
- 65% increase in revenues and profitability
- 400% increase in quoted accessory/replacements jobs

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Commercial contractor achieve:

- 3.25 Average billable hours per commercial repair call
- 5 out of 10 request for quote converted to a sold-job
- Increase project close rates of 50% or more
- 42% Average sold job gross profit margin
- 30% increase in revenues and profitability

They have proper pricing standards & payment protection

Customers expect “upfront” repair, HVAC installation and ductless mini-split pricing. Studies have shown that the average technician is only 52% efficient over a 12-month period, leading flat rate pricing to become the only way to for a contractor to set a fair price without alienating customers. In addition, the best contractors use invoices and proposals that provide payment protection terms, as well as liability protection. The best aspect of flat rate pricing is that it provides you with pricing credibility and can help prevent competition by allowing you to quickly price and propose work on the spot.

The have defined “harvesting” service call and sales call handling processes

For over 20 years all manufacturers have published their Installation & Start-up Instructions. The all say the same thing, if you are starting the system up and leaving it on for the occupants, upon system installation completion, system modification, or upon completion of a repair to:

1. Clean heat transfer surfaces
2. Properly charge the system
3. Properly calibrate and tune-up
4. Verify system is operating safe to on and leave on for customer

The use checklists and forms to assure professional service call handling.

These contractors recognize that the studies are correct, and they too also find 9 out of 10 homes have serious issues. Here is the average financial opportunity listed in order of highest to least frequency:

1. 8 out of 10 need balancing & balancing dampers = \$1200
2. 6 out of 10 need additional supply & returns = \$300
3. 3 out of 10 need communicating/programmable stats = \$350
4. 3 out of 10 need whole house air filtration = \$950
5. 20 out of 10 calls are quoted solutions
6. Most are closing 2 out of 10 calls to a “sold quoted job or replacement”

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They are achieving 2 out of 10 service calls are converted to additional quoted work averaging \$9k to 15K depending on area served by simply “getting eyes-on” and consistently surveying all systems and identifying 100% of opportunities on all calls. The use checklists and forms to assure professional service call and sales call handling.

They Have Consistent Work Delivery

Today, customers demand that their expectations be met exactly the same way every time they buy a service or product. If you can't deliver consistently, they won't call you back. Consistency is the reason many companies follow franchise models like McDonald's, Best Buy and Dunkin Donuts. Each of these brands' restaurant and retail franchises has a manual of company standards and checklists to deliver consistently on each and every order. Notice how employees always ask questions like, “Would you like a pie with that?” It's in the manual. They understand that consistently asking customers what they desire using forms for comfort, health, safety, property or savings has proven to result in increased sales. Like these franchising businesses, the best contractors increase their average repair and replacement ticket and prevent costly call-backs by using proper call handling procedures, onsite call assessment forms, pricing standards and work delivery checklists for every job they do.

They track and adjust labor productivity performance

Tracking your daily billable hours to service calls and jobs is the single best way to know what is needed to stay busy, as well as whether your next hire can be justified. Tracking also allows you to implement performance-based pay for technicians and installers and to know when pricing needs adjusting. Tracking billable hours, the number of service agreements sold and accessories/replacements sold per calls made or hours billed versus job labor budget is simple. A one-truck company can use a pocket note pad and log billable hours after each call; a company with more than one technician or installer can have them call in after a job to debrief. Most contractors know if they are profitable without having to look directly at their finances simply by tracking billable hours.

They motivate their employees by making it a good place to work

This is the most often overlooked business system, regardless of the size of the company. HVAC business owners need to keep their employees motivated and should have systems in place for this. Performance-based pay should be integral for management, office and field staff, but how do owners themselves stay motivated? It happens to all of business owners—when we're faced with obstacles, we can often lose our focus or drive. As an owner, you are faced with business challenges of all magnitudes on a day-to-day basis and it's hard not to feel overwhelmed. However, being your own boss is a rewarding experience, despite the challenges.

Below is an illustration of the HVAC business cash engine. The top contractors understand to accelerate revenue and profit growth needs fuel such branding, lead generation and selling

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processes. They also understand that to keep the cash engine from stalling out they need lubrication such as employee productivity incentives, proper overhead recovery, and written work delivery procedures and forms. See Figure 2. HVAC Business Cash Engine Illustrated.

They enable their staff to learning best HVAC business practices

Most HVAC business owners find it difficult to find the time to learn best practices. They are important to establish, however, in order to survive. At the very least, you should be attending GrowMyHVAC.com's free business training webinars offered through its Business Builders Club. Participate in the forums, follow a few threads, ask a few questions or simply attend.

They have more money, free time and improved quality of life

Written policies and procedures rarely gets the respect they deserve. Most HVAC owners recognize the need for having standard policies, but standard operating procedures often get viewed as a necessary evil. Why is that?

Written work delivery standards create more structure and frees up owner management time in your business. Every HVAC organization benefits from this kind of standardization. Most HVAC service work processes can be duplicated every day within your company. Written work delivery standards provide a way to better communicate and apply consistent standards and practices within your organization. Well-written standards explain visually and make it easier for employees to do their jobs. They don't have to guess how you want a task done or what checklist to use because they can follow a procedure made easy to reference on the computer or as a printout. Through a standard routine, employees enjoy more predictability in their jobs and can hone their skills on each task to raise their overall performance.

Here are the top 10 benefits of having our award winning Ready-Built HVAC residential and commercial contractor written work delivery standard procedures for all work categories:

1. Improve employee and department communication
2. Reduce employee training time
3. Provides your staff the "How-to-do-Book" job training guides on work delivery processes
4. Reduces mobilization and human errors, missed tasking, and business risk
5. Provides the means for consistent work delivery & predictable financial results
6. Successful HVAC managers recognize that Standards get everyone working toward exceptional performance and success for their customers and company
7. Improve profitability and customer satisfaction
8. Provide the vehicle to tune-up the business cash engine.
9. Managers benefit from achieving consistent task performance in meeting the company's business objectives.
10. Naturally, our employees benefit as well from a sense of increased confidence and achievement.

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Plus, better motivated employees provide the company a competitive advantage when they know they are using best practice customer, company and employee friendly written work delivery processes.

It is our core mission and sole purpose of existence, to help you successfully implement Ready-Built HVAC work delivery standard procedures for all work categories. Read this e-Book for tips and techniques that have built-in to writing our policies and procedures that deliver value - and get read or used.

The learn how to profitably drive their HVAC Money Making Machine

This depicts how your *Money Making Machine's* growth is fueled by lead generation and selling processes, your people and resources. The Money Making Machine's *Cash Engine* itself transforms inputs via business systems, checklist processes and incentives. Predictable profits are achieved by your product mix of repair, maintenance and installation services and their associated work delivery standards. Illustrated below in Figure 2. is the Ready-Built HVAC business's *Cash Engine Illustration*.

The Ready-Built HVAC *Money Making Machine*


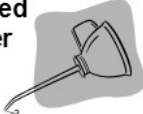

Branding, Systematic Lead Generation and Selling Processes 	SOP's, Profit Based Incentives, Proper Work Pricing Procedures 	Increased Profits & Retained Earnings 
Inputs	Cash Engine 7 Key Ready-Built Business Systems & Processes, and Checklists	Outputs
<ol style="list-style-type: none"> 1. Trained People 2. Equipment 3. Materials 4. Parts 5. Subcontractors 6. Capital 	<ol style="list-style-type: none"> 1. Proper lead generation 2. Proper pricing standards & payment protection 3. Professional service and sales call handling 4. Consistent work delivery & profitability 5. Staff learning best HVAC business system practices 6. Motivating your employees to higher levels of productivity 7. Tracking financial & individual daily labor performance 	<ol style="list-style-type: none"> 1. Demand Service 2. Service Agreements 3. Quoted Jobs 4. Equipment Replacement 5. DS/BLD Projects
\$ Cost of Goods Sold (COGS)	Adding Value (Overhead - OH)	Revenue - (COGS+OH)= PROFITS

Figure 2. HVAC Business Cash Engine Illustrated

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Most HVAC business's typically find that for every dollar they have in service agreements they have \$8 to \$10 dollars in demand service each year. These combined are considered and valued as renewable revenue streams. The net worth of your HVAC cash engine's net worth can be approximately estimates as 1.5 times net profits on your jobs and quoted work, and up to 6-time net profits on service agreements and associated demand service. A 5% increase in service agreements yields about 30% increase in your service business value.

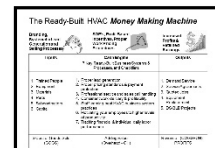
Therefore, due to the greater business value per dollar, we help you to business systems in place to help systematically to close 6 out of 10 repairs to a service agreement. We also provide you selling systems to help you close 80% to a replacement when repair is 40% or greater of a new install.

You can't do it alone

You can conceive a business on your own. You can create a business on your own. However, very shortly thereafter, you will need business help. Sometimes you don't know what you need to do or to know, or what to even ask.

Owning a HVAC business can be very lonely, scary and often overwhelming, unless you luckily tap into our low cost online available HVAC business help! Here are the top reasons, in our 20+ year of experience, why HVAC business owners and managers can't go it alone, if they're truly going to be successful.

1. **You need the proper HVAC business systems in place.** Business systems are essential for a successful HVAC business. Here are our Ready-Built HVAC Program's 7-Business systems for consistently maximizing your profitability and INCREASE YOUR HVAC CASH ENGINE. Many contractors realize they need these systems, but don't know how to put them in place. What HVAC owners and managers need are tried and true systems that have already been tested, improved upon and perfected. By enrolling in our expert Ready-Built HVAC Contractor Program, we know what to do, and show you how to do it. We help you fast track success by helping you implement proper systems, checklist, and forms in place!



2. **You need to make more money.** The goal as business owners is to make money. However, one thing is for sure: one phone call with our business fitness coach could drastically increase your income. Most HVAC contractors see an average of 65% in service tickets that triples their earnings. When you're ready to make more money, you'll need best practice HVAC business information in your business to help take your business to the next level.
3. **You know what to do, but not how to do it.** In today's online information age, it's easy for you and your staff to learn what to do and how to do it. We provide best practices along with implementation support to prevent frustration. Having the Ready-Built HVAC

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Contractor program that knows step by step, piece by piece and by business stage level by business stage level how to succeed, it will change your HVAC business forever!

4. **You've lost sight of your dreams and goals.** Sometimes, life happens. We have kids, and we think we have to put our dreams on hold while we tend to them. Then when our kids are out on their own, we think we're past our prime and it's too late to pursue those dreams. However, the good news is though – you don't have to put business growth on hold!
5. **You feel stuck.** The number one thing that keeps people from achieving more and doing more is their state of mental mindset. Deep down, they're scared to make a move. They fear failure and some even fear success. They want to make advances, but they're afraid of what will happen when they finally do advance. The Ready-Built HVAC Contractor program coaching program helps our client to get out of their rut, we help you to reprogram your mind to think, see and respond like a winner so they can truly soar!

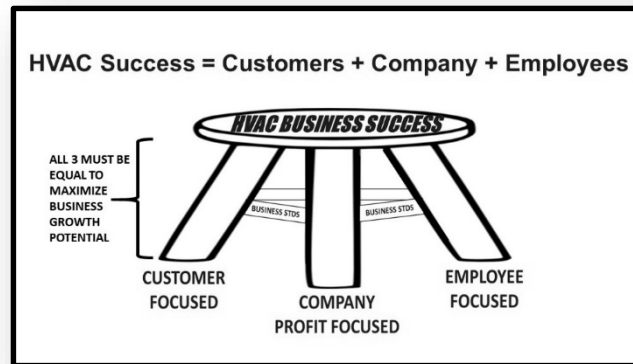
3-key essential drivers of successful HVAC business

Our Ready-Built HVAC Success Stool Model is designed to help you drive your company's 3-key essential elements of success or 3-legs of a 3-Legged HVAC Business Success Stool of a high-performing HVAC business:

1. *More Customers Focused:* to obtain and retain more-happy customers
2. *More Company Focused:* to obtain more revenue and profits
3. *More Employees Focused:* to make it a more attractive place to work

The 3-legged stool is a great way to frame a discussion about these 3 essential elements. These 3 legs of the stool—reflect the key elements of any high performing HVAC Business. If all 3 business legs are strong, chances are that everyone—customers, employees, and shareholders—s happy. To be successful, you can't have weakness in one leg without weakness showing up in the other 2 legs; if any leg of the stool is weak, the stool will be uneven or worse – the business will fall down and inevitably fail.

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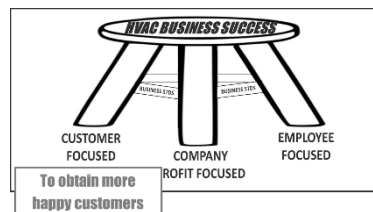


If customers aren't happy, business results will suffer. If the company's performance is positive, then employees are happy, they do their best work for customers. So let's have a closer look at each of the 3 legs in the high-performing HVAC Business stool.

Customer Focused

The first and most important leg is the key essential element of Customers Focused: to obtain AND RETAIN more-happy customers.

1. Accurate Estimates/Pricing
2. Accurate Work Delivery
3. Work Delivery Verification



We help you to be more Customer Focused by helping you strive to be adhere to what Jeffrey Preston Bezos, founder and CEO of Amazon.com, famously quoted:

"We see our customers as invited guests to a party, and we are the hosts. It's our job every day to make every important aspect of the customer experience a little bit better."

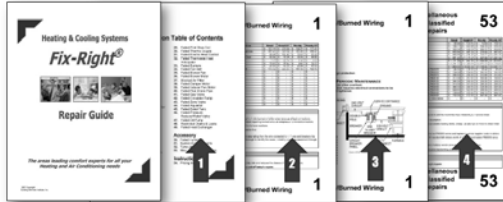
Let's take a closer look at the first of the 3 sub-elements of Customer Focused – 100% customer satisfaction.

Providing 100% Customer Satisfaction

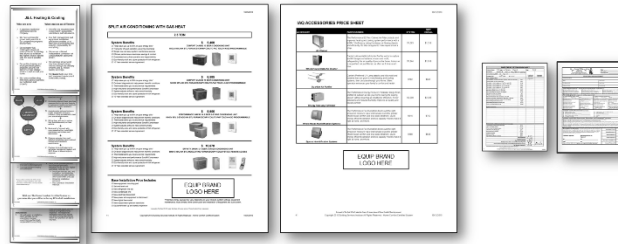
1. Using Accurate Estimates:

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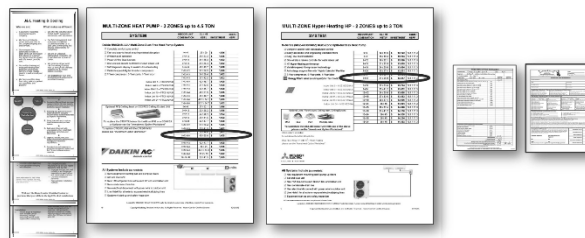
- I. **Residential Repair:** Consumers customers prefer upfront pricing. They like to know the price before authorizing the work. Fix-Right flat rate repair pricing provides the contractor the means to provide and upfront price to the customer while enabling the contractor to recover the high non-chargeable labor hour overhead in order to make a fair profit. **We also provide 2 other price guides, Fix-Right Plumbing Repair and Fix-Right Electrical Repair.**



- II. **Residential Replacement:** Home Comfort Certified System Flat rate HVAC replacement pricing provides the contractor the means to provide and upfront price to the customer while enabling the contractor to close more jobs and at higher margins by showing their solution's affordability using the price guides "built-in" energy savings and finance tables.



- III. **Residential Ductless Split:** Home Comfort Certified System Flat rate ductless split pricing provides the contractor the means to provide and upfront price to the customer.



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- IV. **Commercial Service Agreements:** Our AccuPro commercial service agreement pricing program provides the contractor the means to quickly provide annual, quarterly or monthly price to the customer for inspection, full labor and full coverage service agreements. Plus, we help you improve service agreement close rates by training your commercial service sales reps to properly survey, interview customer for needs, price, professionally position and propose, close and how to properly book the commercial service agreement job.



- V. **Projects/Design-Build:** Our ProjectPro project and or design-build pricing program provides the contractor the means to quickly provide a quoted price to the customer for any commercial replacement, retrofit, upgrade, energy saving or design build project. Plus, we help you improve project close rates by training your commercial sales reps to properly survey, interview customer for needs, price, professionally position and propose, close and how to properly book the commercial quoted job.



2. Accurate Delivery:

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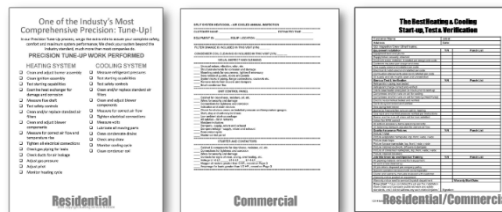
- I. **Written Work Delivery Standards:** Today customers demand having their expectations met exactly the same way every time they buy a service or product. If you can't deliver consistently then they won't call you back. Without consistency you experience profit losses. Consistency can be achieved by SIMPLY implementing our Ready-Built HVAC Work Delivery Standards for each work category. Plus, we help you improve quality assurance by training your staff to properly survey, interview customer for needs, price, propose, close, book jobs and how to properly deliver best in class work.



3. Work Delivery Verification:

- I. **Start-up, Test & Verification Checklists:** Written residential and commercial work delivery standards should be used for all work categories. Written standards double as “How-to-do” books to provide individual staff training on proven best-in-class work delivery processes & associated forms.

Standards result in reduction in mobilization and human errors, missed tasking, and business risk. Plus, holding field people accountable for improved quality control for service repairs, quoted jobs, maintenance and job start-up, test & verification checklists.



Obtaining 100% Customer Retention

The second sub-element of Customers Focused is to strive for 100% CUSTOMER RETENTION.

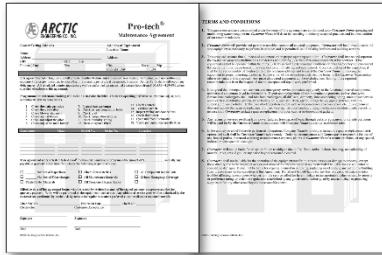
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You can achieve retention with:

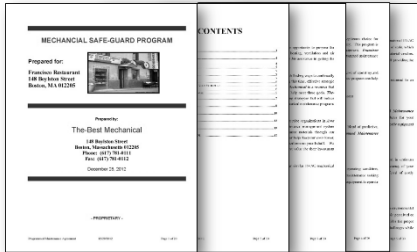
1. Service Agreements
2. Loyalty Programs
3. Social Connections

1. Service agreements:

- I. **Retail Residential Service Agreements:** Service agreements help you to lock in your service base. You will find that our retail residential program helps our clients to close 8 out of 10 non-service agreement customers to a service agreement.



- II. **Commercial Service Agreements:** help you to lock in your service base. You will find that our retail residential program helps our clients to close 8 out of 10 non-service agreement customers to a service agreement.



2. Loyalty Programs:

- I. **Retail Residential Loyalty Programs:** help you to encourage future purchases. Ever hear the 80/20 rule - where 80 percent of your sales will come from 20% of our customers? Customer retention is the key to healthy business growth. Our loyalty programs you most

Loyalty that add like extra service tenure.



can help retain your valuable customers. program incentives points on agreement Loyalty

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rewards are an attractive selling tool to new customers and enticing feature to existing customers that you haven't seen in a while. After each service call, sales call or installation you should provide your customer with your loyalty program offers. We present 3 examples of our loyalty programs.

3. Social Connections:

- I. **Social connections:** enable you to keep consumer customers informed of seasonal “how-to-do” energy savings, improve comfort and indoor air quality, and help them make the when best to repair or replace decision. Even if your HVAC business is small you should have our Ready-Built website to establish a local market presence. Nowadays, 87% consumers shop now online and 67% use their smart phone to purchase 3 main HVAC services to include:
 - i. Service repairs
 - ii. Tune-ups
 - iii. Upgrades / System fixes / Enhancements and Replacements / Adding Heating/Cooling Capacity be used off a future replacement

The next good reason to put your business on the web, is that it is the least expensive and simply way to pass out your business card to thousands of potential clients within your selling area. Our Ready-Built website retail residential website provides bi-monthly blogging, which can be enabled post direct connections to Facebook and Twitter, as well as, posting of your own blogs.

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Obtaining 25%+ Referrals

The 3rd sub-element of Customers Focused is to strive for CUSTOMER REFERRALS

You can Obtain referrals with:

1. Post installation happy call visits to obtain 25% or more referrals.
2. Friends and family coupons
3. Discount coupons and seasonal specials

1. Post Installation Happy Call Visit

- I. **Conducting a “Post Installation Happy Call” visit:** this is done by either the Selling Tech or Comfort Advisor who upon installation completion schedules a return follow-up on-site visit with customer to:
 - i. Answer any questions they may have
 - ii. Present warranty information and its requirement for periodic maintenance
 - iii. Present Friends and Family Incentives
 - iv. And to naturally obtain referrals - since the customer tends to be the happiest



2. Provide on “all calls” the Friends & Family Incentives

- I. **Provide on “all calls” the Friends & Family Incentives:** which can include:
 - i. A Free 1st maintenance inspection
 - ii. \$50 off a repair

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- iii. \$500 in rebates off new system installation



3. Discount coupons and seasonal specials:

- I. **Discount Coupons:** Provide on “all calls” the discount coupons which can include:
 - II. \$50 off a repair
 - III. \$25 off a tune-up
 - IV. Up to \$1500 in rebates off new system installation

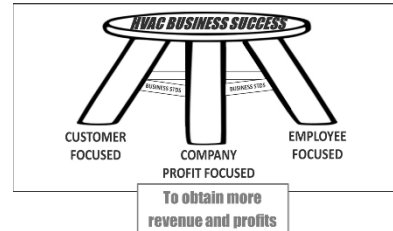


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Company Focused

The 2nd and most important leg is the key essential element of being Company Focused: to obtain more revenue and profits.

1. Company Profitability
2. Business Growth
3. Business Sustainability



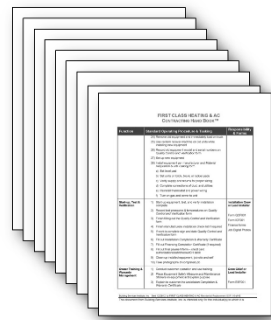
We know what HVAC Contractors clients need in their businesses to be successful. In a market that seems to get more challenging every year, you need tools, proven business processes, work delivery forms and strategies to increase lead conversion rates and decrease the time dedicated to serving customers.

Company Profitability

1. Business Systems:

I. Benefits of Business Systems:

- i. Helps your staff to “harvest” more opportunities on all calls
- ii. Helps your business to achieve consistent work delivery & profitability
- iii. Provides proper overhead recovery and net profit pricing standards
- iv. Provides payment protection
- v. Enables your staff to learning best HVAC business system practices
- vi. Provides the “How-to-do” job instruction sets
- vii. Motivates your people to higher levels of productivity
- viii. Typically tied to individual job descriptions & associated incentive plans
- ix. Enables you to track financial
- x. Enables you to track daily individual daily labor performance



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II. Individual Staff Job Training:

- i. **Good for the Company:** Training is good for your business and can improve business performance, profit and staff morale. Advantages to your business include in better customer service, better work safety practices and productivity improvements. We provide online staff job training for all HVAC retail residential and commercial service HVAC positions.

Manager/Office Job Training Tracks	Retail Residential Job Training Tracks	Commercial Service Job Training Tracks
<ul style="list-style-type: none">• Owner/General Manager• Human Resource Manager• Financial Manager• Comptroller-Credit Manager• Office Manager• Stock Clerk• Book Keeper	<ul style="list-style-type: none">• Residential Service Manager• Residential Installation Manager• Residential Marketing Manager• Residential Sales Manager• Dispatcher/Customer Care Manager• Residential Comfort Advisor• Residential Technician• Residential Selling Technician• Residential Installer	<ul style="list-style-type: none">• Commercial Service Manager• Commercial Sales Manager• Commercial Service Sales Rep.• Commercial Design-Built Sales Rep.• Dispatcher/Customer Care Manager• Service Agreement Estimator• Project Estimator• Commercial Technician• Commercial Installer

- ii. **Good for your workers:** Training your staff on how to properly do their jobs has many benefits. They learn best practice individual job skills, processes and forms, increasing their contribution to the business (customer, company, and fellow employees while building their self-esteem in the process). Online job training enables them to learn other positions with better prospects and/or better pay. Also, when training is made available 24/7, they see that you value them enough to invest in them.

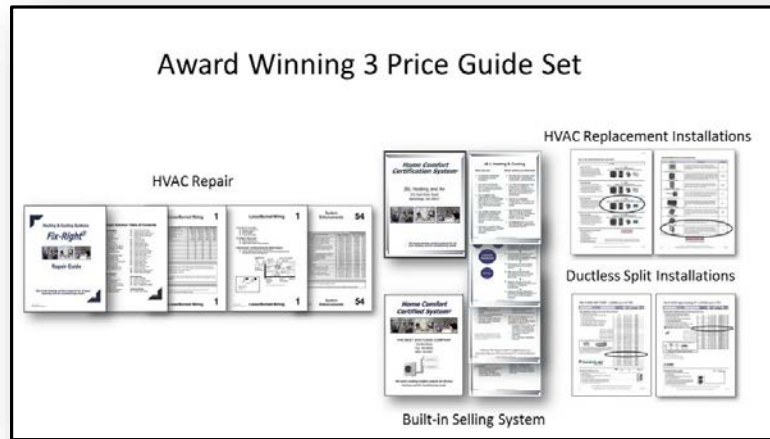


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2. Pricing Standards

1. Complete Flat Rate Repair, Replacement & Ductless Mini-Split Price Guide Set:

- I. Having a complete set of retail residential flat rate HVAC Installation and ductless split pricing standards help prevents underpricing as well as provide a vehicle to close more and at higher margins. We presented earlier our retail residential Fix-Right Repair, Home Comfort HVAC and Ductless Mini Split Flat Rate Installations flat rate price guides. Plus, ductless mini-splits are expanding in popularity, and becoming true competition to central systems. Each includes appropriate technician, selling tech and comfort advisor price guide LIVE ONLINE USER TRAINING. We also provide flat rate price guides for Fix-Right Plumbing Repair, Fix-Right Electrical Repair, and Gen-Pro Generator Installation.



- II. With our Home Comfort Certified System Installation Guides, our clients easily upsell using the good-better-best-premium pricing options and showing how consumer just how affordable the option has. For example, they can illustrate how a 16 SEER system has a much lower net monthly cost of ownership than say a 14 SEER using the built-in finance and energy savings tables.

Three pages of a calculator. The first page is a 'MEASUREMENT OF THE WORKSITE' form with various input fields. The second and third pages are 'Home Comfort Energy Savings Calculator' spreadsheets. The second page shows a table with columns for 'SEER', 'EER', 'HSPF', 'Net Monthly Cost', and 'Net Annual Cost'. A circled area highlights the 'Net Monthly Cost' column. The third page shows another similar table with a circled area highlighting the 'Net Monthly Cost' column.

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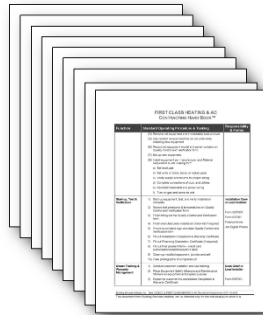
- III. Our contractor clients tend to close more and at higher margins by only getting low when needed with a **built-in 3-Tier REBATE TABLE**. You easily can get all the way down to your walk-away installation price using a rebate of either 5% - 10% -15% rebate off the total published price.

Home Comfort Rebate Pricing Companion

Base Installation Price Up To:	Tier 1 Rebate	Tier 2 Rebate	Tier 3 Rebate
\$2,500	\$125	\$250	\$375
\$3,000	\$150	\$300	\$450
\$3,500	\$175	\$350	\$525
\$4,000	\$200	\$400	\$600
\$4,500	\$225	\$450	\$675
\$5,000	\$250	\$500	\$750
\$5,500	\$275	\$550	\$825
\$6,000	\$300	\$600	\$900
\$6,500	\$325	\$650	\$975
\$7,000	\$350	\$700	\$1,050
\$7,500	\$375	\$750	\$1,125
\$8,000	\$400	\$800	\$1,200
\$8,500	\$425	\$850	\$1,275
\$9,000	\$450	\$900	\$1,350
\$9,500	\$475	\$950	\$1,425
\$10,000	\$500	\$1,000	\$1,500
\$10,500	\$525	\$1,050	\$1,575
\$11,000	\$550	\$1,100	\$1,650
\$11,500	\$575	\$1,150	\$1,725
\$12,000	\$600	\$1,200	\$1,800
\$12,500	\$625	\$1,250	\$1,875

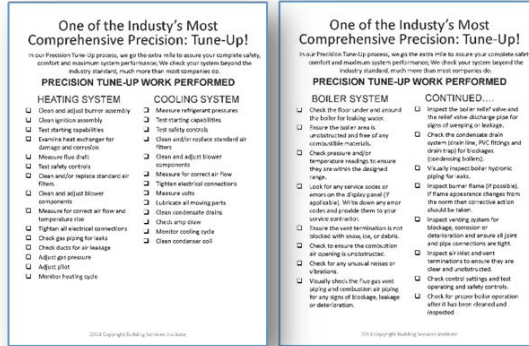
3. Written Work Delivery Standards

- I. **Complete set of written work delivery processes & forms:** Written residential and commercial work delivery standards should be used for all work categories. Written standards double as “How-to-do-Books” to provide individual staff training on proven best-in-class work delivery processes & associated forms.



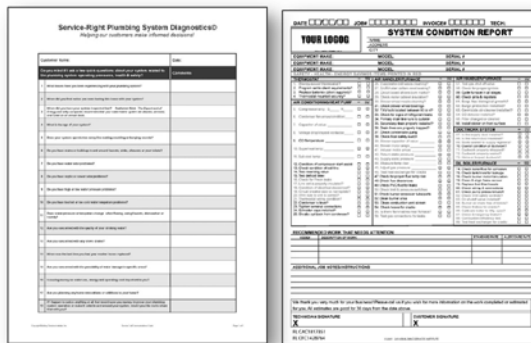
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II. **Reduce Costly Call-Backs:** Standards result in reduction in mobilization and human errors, missed tasking, and business risk. Plus they hold your field people accountable for improved quality control with our processes associated service repair, quoted job, maintenance and proper start-up, test & verification checklists.



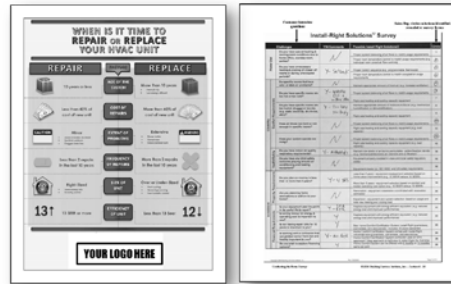
III. **Provides Consistent Profitability:**

- i. Having proper service call handling process that incorporates our Service-Right System Diagnostic Form and the System Condition Report enables your technician to systemically:
 1. Help your customer identify what their comfort, health, safety, property, or financial improvement and other system enhancement options are.
 2. Help your technician to set the stage for pricing and presenting future recommendations right on the System Condition Report for any system fixes, energy saving, indoor air quality add-ons or complete system replacements.



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- ii. Having proper retail residential installation sales call handling process that incorporates our Replace Decision Matrix along with our Installed-Right System Diagnostic Form enables your selling tech or comfort advisor to systemically:
 1. Help the customer to objectively make the replacement decision.
 2. As well as to help your customer identify what their comfort, health, safety, property, or financial improvement options they may desire to be included in the replacement installation.



Growth

1. Internet/Smartphone Accessible:

I. Benefits of our HVAC Website/Smartphone Ready Business Systems:

- i. Nowadays, 87% consumers shop now online and 67% use their smart phone to purchase HVAC services to include:
 1. Service repairs
 2. Tune-ups
 3. IAQ & Accessory Enhancements
 4. Upgrades / System Fixes / Replacements
- ii. The next good reason to put your business on the web, is that it is the least expensive and simply way to pass out your business card to thousands of potential clients within your selling area.
- iii. Our Ready-Built website provides bi-monthly blogging, which can be enabled post direct connections to Twitter, as well as, your ability to posting FREE your own blogs and specials.
- iv. Although our sites rank high in some areas, due to local internet competition, we can't guarantee your fair share of leads. For competitive areas where AdWords campaigns are needed to improve rankings enough in order to generate leads, we offer an upgrade to a customized professional HVAC WordPress based website, for a one-time fee of only \$750.

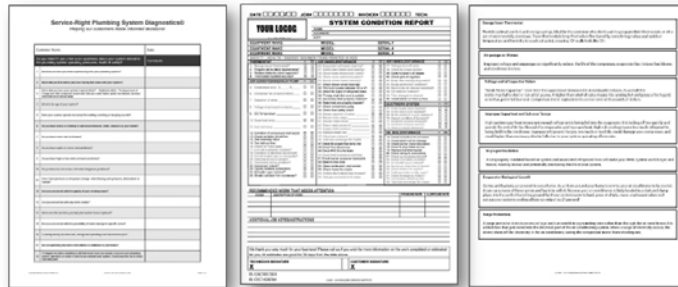


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2. Proper Call Handling Procedures:

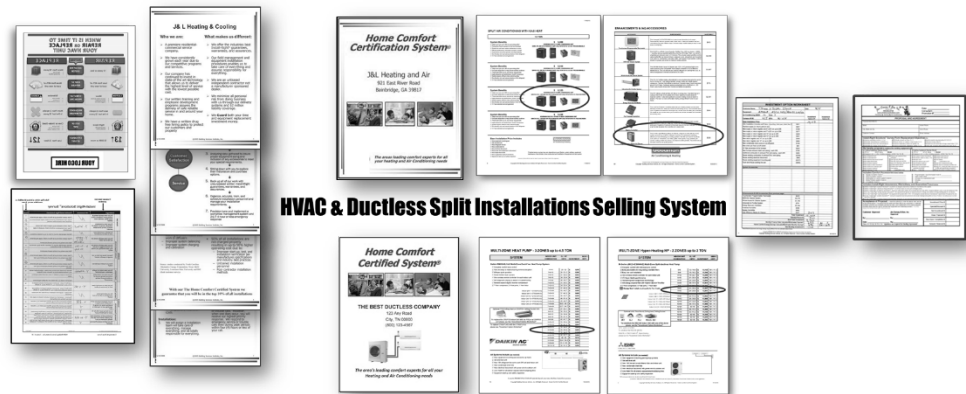
I. Professional SERVICE Call Handling Process & Forms:

- i. Help your customer identify what their comfort, health, safety, property, or financial improvement and other system enhancement options are.
- ii. Using our call handling forms and pricing methods, most contractors close:
 1. Higher average billable hours per repair ticket of 65%+
 2. 8 out of 10 repairs converted to a sold service agreement
 3. 2 out of 10 calls to a quoted job or replacement
 4. 8 out of 10 catastrophic repairs converted to a sold replacement



II. Professional SALES Call Handling Process & Forms:

- i. Using our call handling forms and pricing methods, most contractors close:
 1. Higher average replacement sales per repair ticket of 35%+
 2. 8 out of 10 catastrophic repairs converted to a sold replacement
 3. 6 out of 10 request for quoted replacement
 4. Increase average gross margins by 35%+



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3. Opportunity Assessment Forms:

I. Benefits of Opportunity Assessment Forms:

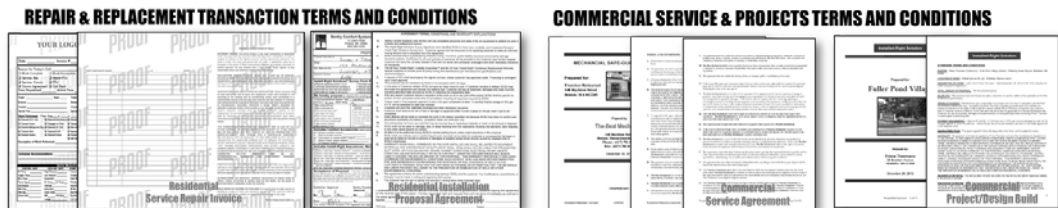
- i. Having proper Opportunity Assessment Forms helps your service and sales people to gather financial transaction details, scope of work, and where appropriate gather system, equipment, technical, as well as, to identify “how best” to position your offerings to meet customer’s unique needs.



Sustainability

1. Transaction Liability/Payment Protection:

- i. Making operations sustainable is just another lens for creating a better company. The motivation should come from the desire to make your HVAC business as efficient, productive, profitable, ethical, and admirable as it can be. Your transaction documents must get you paid on time and in full specifying proper payment and liability protection terms and conditions within all invoices, replacement proposal, project proposals and service agreements.



2. Company Published Work Delivery & Safety Standards:

- i. **Written work delivery safety standards:** A written safety standards policy provides the foundation for every successful safety program and could help you avoid the unnecessary expense, inconvenience, and other consequences of

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- workplace accidents by making sure that employees know what is expected of them.
- i. Although you can orally inform employees of your safety standards and procedures, but for a lasting impact there is no substitute for a written Safety Standards policy to which an employee may refer.
 - ii. And if each employee acknowledges that he or she has read the policy, it can help protect you when there is a workplace accident. These we recommend this acknowledgement be kept within each employee's employment record.
 - iii. This tool is provided as an example of work health and safety standards policy to help you manage your human resources.
- II. As part of your written safety standards and procedures, and as integral to your written work delivery standards, you should employ Equipment and System Start-up, Test and Work Verification Checklists that are signed by your technician or Installer.
- III. Both of these tools helps protect your customers, as well as, your business from unnecessary liability claims resulting from work related property damages and from personal injury. Adherence to standards via the use of work delivery checklists helps ensure safety, reliability and environmental care. As a result, our customers perceive a standardized set of services as more dependable – this in turn increases sales and the acceptance of our technician's, selling tech's, sales people's recommendations.

The image shows a table of contents for a 'Safety Training Manual'. It lists various topics such as 'Safety', 'Safety Standards', 'Safety Procedures', and 'Safety Policies' with corresponding page numbers. The manual is dated 'Third Edition 2016'.

RECOMMISSIONING & START-UP, TEST & VERIFICATION

The image displays three checklists for HVAC services:

- Residential Precision Tune-up:** Titled 'One of the Industry's Most Comprehensive Precision Tune-Up!', it includes sections for 'PRECISION TUNE-UP WORK PERFORMED', 'HEATING SYSTEM', and 'COOLING SYSTEM'. It lists various tasks like checking air filters, inspecting burners, and testing safety controls.
- Commercial Precision Tune-up:** This checklist is more detailed, covering a wide range of components and systems for commercial buildings.
- Residential/Commercial Installation:** Titled 'The Best Heating & Cooling Start-up, Test & Verification', it provides a comprehensive checklist for the installation and start-up of HVAC systems in both residential and commercial settings.

3. Proper Staff Incentives:

I. Incentives Increase Morale:

- i. The key to having a culture of customer and profit focus is having proper staff incentives that pay your people like business owners. A simple "thank you" or "good job" from an owner or manager can go a long way in

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making a person feel confident and proud in his or her job. However financial incentives enable you to keep good help and attract more good help.

1. It's pretty simple - incentives give the best people in the organization reasons to stay.
 2. And good news travels fast - as others in the HVAC industry are looking for good paid job opportunities, they will naturally turn towards your HVAC business as a place they want to work.
 3. Our incentives are designed to increase individual labor productivity, work safety, and can be customized for anything else you wish to improve.
 4. If it is understood by your staff that increased productivity and a decrease in call-backs, technicians and installers get handsomely rewarded, then your people will do their best to be productive and safe.
 5. Bottom line? When people are paid like owners for their contributions to 100% customer satisfaction and achievement of job profitability - then things get done.
- ii. Below we illustrate our management, administrative staff, technician and installer performance based financial incentive plans. The lower right is illustrated the post call debriefing program that automatically calculates residential technician or installer individual daily performance based pay.

PAY MANAGERS, OFFICE, TECHS AND INSTALLERS LIKE OWNERS

The image displays three sample documents illustrating performance-based financial incentive plans for different roles:

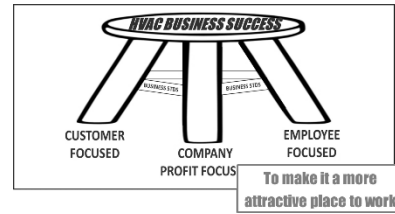
- Service Manager:** A document titled "SERVICE MANAGER PERFORMANCE INCENTIVE COMPENSATION PLAN". It outlines the plan's purpose, key measurements used to calculate incentive payment (such as customer satisfaction, call-backs, and safety), and a performance-based incentive calculation section.
- Administrative:** A document titled "THE BEST HEATING & AIR CONDITIONING Customer Rewards Program PERFORMANCE BASED PAY". It details the program's goals, responsibilities, and a list of key performance indicators (KPIs) for administrative staff, including customer satisfaction, call-backs, and safety.
- Technician/Installers:** A document titled "The Best Heating & Cooling Memo". It provides a memo format for technicians and installers, detailing their responsibilities, key measurements, and a list of KPIs for their role, such as customer satisfaction, call-backs, and safety.

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Employee Focused

The 3rd and most important leg is the key essential element of being Employee Focused: to make it a better place to work.

1. Best trained
2. 100% Employee Retention
3. Best people



We know what HVAC Contractors clients need in their businesses to be successful. In a market that seems to get more challenging every year, you need tools, proven business processes, work delivery forms and strategies to increase lead conversion rates and decrease the time dedicated to serving customers.

Let's take a closer look at the first of the 3 sub-elements of Employee Focused – Best Trained.

Best Trained

1. Benefits of Job Training:

- I. By providing our online individual job training presents a prime opportunity to easily expand the knowledge base of all your employees on best-of-the-best HVAC business practices. Plus, properly trained technicians and installers improve the accuracy of a repair or installation while reducing costly call-backs.
- II. By having access to our Coaching/Mentoring enables working online with you and your staff LIVE via High Definition Growth Strategy Workout Session GoToMeetings. To help expedite your business growth, your Coach and Mentor, acts as your private tour guide through your subscribed Ready-Built HVAC Contractor Program. Your coach is responsible to help you track-to-completion all your profit enhancement initiatives.
- III. Learning is a way of life in the Ready-Built HVAC Program. Our methods, policies, and procedures are unique to the “best in class HVAC contractors” in the industry. Today, hiring a walk-in-off-the-street, start-tomorrow-at-full-speed match is highly unlikely. We believe that keeping everyone on top of changes in technology, competition, and customer demands is critical to your BUSINESS success and survival.



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100% Employee Retention

1. Professional Business Standards:

- I. Studies show that people tend to be better motivated when they know they are using industry customer, company and employee friendly written residential and commercial work delivery processes. We have written standards for all HVAC work categories from a lead to work close out.
- II. Key Benefits of written standard procedures manuals provide are:
 - i. They provide a useful system to streamline your business is having a Standard Operating Procedures (SOP) manual.
 - ii. Our written standards list all the tasks that are essential for your business success, how to do these tasks, and who is responsible for the tasks listed from inbound call to job closeout.
 - iii. They reduced learning curve/training time for new hires.
 - iv. They ensure business continuity by being able to refer to the SOP so someone else can take over the urgent tasks and do them correctly the first time.
 - v. The standardized processes and forms easily handle repetitive situations/tasks.
 - vi. If you need to delegate a certain task, you can see at a glance who you will be able to help you or advise you. You can stop micromanaging, as it is clear who is responsible for what.
 - vii. They help ensure that your clients are getting the best possible experience with you.

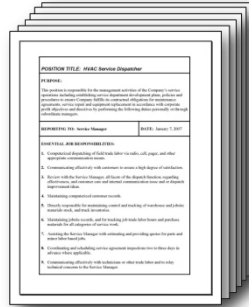


2. Clear Job Descriptions:

- i. **Performance Based Job Descriptions:** Clear performance based job descriptions are proven to motivate employees, since they know their individual job performance and behavior expectations. We provide our clients with a complete set of performance based job descriptions for all positions that are tied to:
 1. The company's standards & company culture
 2. The essential job duties and functions
 3. The essential job technical skills requirements
 4. The minimum education and training requirements
 5. The minimum prior work experience
 6. They fully explain the jobs minimum performance, productivity & behavior factors

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7. For staff members that do multiple jobs within the company, we can combine several of performance based job descriptions to make one that fits the employee's unique minimum job related duties and behavior factors.



3. Best Paid:

I. Proper Pay Motivates Employees:

- i. Studies have shown that for employees to be motivated, recruiting minimums must be present. These include pay, working conditions and job security. Without these, headhunting even the best employees will yield undesired performance results.
- ii. Proper pay motivates employees and has helps ensure you are fairly compensating for them to adhere to company minimum pricing and safety standards, as well as, for them to consistently help your customers buy system enhancements or system fixes to improve their comfort, health, safety, or to match the system to functional use, or to achieve financial savings from their HVAC systems.
- iii. Best Paid means paying people more than they expect is proven to elicit reciprocity in the form of greater effort and greater productivity when the additional pay especially when the pay is presented as part of their own contributions in the form of customer rewards, and with no strings attached. Whether you are a manager, support or in the field, our performance based pay systems provide compensating your people in similar fashion as the business owner, off of the increased profitability which the company pricing, selling and work delivery standards produce.

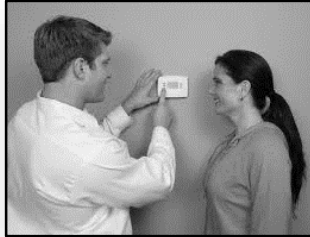


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Best People

1. Customer Focused:

- I. The orientation of an HVAC business toward serving its clients' needs having a customer focus. We help you to hire employees that have a - proven track record - of putting customer focus first to ensure customers' satisfaction.
- II. These new hires tend to appreciate being able to work for a company that uses upfront pricing, proven service call and sales call handling processes & forms, and uses proper work delivery procedures, as well as, adheres to all industry endorsed HVAC service & safety standards.



2. Profit Focused:

- I. We help you to hire employees to focus on *creating value* for *all* your customers. We help you to explore customer HVAC related options by *telling not selling*. We aim to help you *earn a fair profit*, without alienating our customers.



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3. Committed Workers to Customer, Company and Self:

I. Benefits of Business Systems:

- i. We help you find employees who feel passionate about what they're doing. No business can survive for long unless employees have a personal investment in its success
- ii. Committed employees do whatever it takes to excel, even if it means taking on extra tasks, or staying beyond their allotted schedule



7-Step Business System Implementation Process

Ready-Built HVAC contractor trainings is intentionally broken down into easy to consume sessions, so that you and your staff have the opportunity to give each one the thought and consideration your HVAC business deserves. We help you spoon feed best practices into your organization and based on your availability to work on the business.

Below is our, unanimously endorsed by most business turnaround consultants, business systems implementation strategy, and shown in order of greatest to least profit impact priority:

❖ Making the phone ring more by:

1. Generate your leads right:
 - SEO blogging, reviews and inbound links
 - Using call assessment forms on all service and sales calls
 - Sending seasonally timed internet SEM/direct mail campaigns

❖ Making more money by:

2. Pricing your services right
3. Selling your services based on value not price

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4. Delivering your services right
5. Right sizing your staff right
6. Motivating your staff right
7. Keeping your business on the right track

❖ **Making more FREE time by:**

Managing your business with our Ready-Built business systems, processes & checklists - not people!!

We help you learn what works in a hvac business

Whatever frustration you're experiencing in your hvac business, we've found the best solutions and the best means to transform your business over three decades, working with thousands of HVAC business owners—learning what works in a hvac business and provides you the correct questions to ask.

We'll show you how to create consistency and predictability, improve your financial performance and have fun doing it.

We are a simple and effective way to looking at your hvac business as a set of step-by-step business processes, checklists and forms which act as a "GENERAL MANAGER" by implementing an integrated "set of HVAC business systems and controls" to assure consistent and profitable growth.

No other HVAC business consulting organization has had more direct experience applying the lessons of implementing franchise-like set of business development processes to the development of Retail Residential and Commercial HVAC businesses than we have. Even though the Ready-Built HVAC Contractor program is complete, it still requires hard work. Truly, the program will change your business and it will change the quality of your life.

The U.S. Commerce Department reported that less than 5 out of 100 of franchises fail on an annual basis or 25 out of 100 within five years versus more than 80-percent of independently owned businesses. Obviously, the power of the franchise-like business format that the Ready-Built HVAC Contractor Program uses guarantees the future success of your business.

The franchise-like business platform that the Ready-Built HVAC Contractor Program uses is a standardized way of doing business that enables business tasking to be profitably replicated every single time. For your business to be predictable, your people performing their job tasking must also be predictable. In fact, Ready-Built HVAC Business Systems provide the vehicle to facilitate this predictability.

Ready-Built HVAC Contractor Program

2016

User Guide

Access to whole department business systems
Fast financial & labor management & controls

Learn how to implement the Ready-Built HVAC Contractor retail residential, commercial service, human resource management and financial management subscribers available lead generation, marketing, surveying, estimating, pricing, selling, delivery processes for HVAC repair, maintenance, replacement or design-build/project services in your area.



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WELCOME ABOARD

WELCOME TO READY-BUILT HVAC CONTRACTOR PROGRAM - USER GUIDE

Welcome to the Ready-Built HVAC Contractor™ User Guide. This online Ready-Built HVAC Contractor program is designed to provide you with Retail Residential and Commercial Service HVAC business systems, processes and forms for the entire business operating processes. Ready-Built HVAC provides defined operating company standards, processes & forms and staff job & implementation training that is typically only included in a very costly HVAC Business “franchise” and does everything BSI’s onsite implementation version does, but is delivered 100% online LIVE and pre-recorded for FAST business transformation in a tenth of the time and less than (1) 100th of the cost.

How good is our program? Our HVAC client’s base includes past and current “franchisee” Owner/Manager clients.

The Ready-Built HVAC Contractor program is designed to help you FAST TRACK to more profitability!

IMPORTANT ONLINE COMMUNICATION NOTICE: This program is delivered and supported 100% online. The email address you subscribed with and subsequent staff email addresses provided is the preferred means of communicating to you our website, price guide set-up forms, receiving Ready-Built HVAC Program Business Process Implementation GoToMeeting support invites, training session instruction sets, and or for you to request from us any program use and implementation support.

For immediate response, you may directly email your business fitness coach’s email address provided or his direct phone number provided to you per our “welcome aboard email” sent to upon your subscription and to your subscriber email address provided on your Ready-Built HVAC License Agreement, or if you can’t find, simply contact us through our **EMAIL HOT LINE** info@GrowMyHVAC.com or 603-556-1611.

WHO WE ARE AND WHAT MAKES US DIFFERENT?

OUR TARGET AUDIENCE: The Average HVAC Contractor makes ONLY 2.3% net profit before taxes, and 10% of ALL HVAC companies experience serious cash flow problems, poor customer and employee retention problems, and some even suffer business failure each year. Our clients find that the biggest contributor to poor profitability is an absence of defined business operating systems, processes/forms and or daily labor management.

Sources:

- US Census Bureau
- E-Myth, Contractor
- Distributor Sales & Collection Records
- Client Performance Interviews

WHO SHOULD SUBSCRIBE? Those who wish to own or manage any aspect of a successful HVAC business are most interested in the FAST START the Ready-Built HVAC Contractor Program provides through online delivery of complete HVAC business operating systems, management and

staff training, process implementation & transformation assistance to best practice, and business support & coaching. The online sessions are also packaged to provide expert job training for the below management, marketing, pricing, selling, administrative, operation, labor management, work delivery management, human resource management, financial management, to include:

GENERAL MANAGER/OFFICE JOB TRAINING TRACKS

- Owner/General Manager
- Human Resource Manager
- Financial Manager
- Comptroller-Credit Manager
- Office Manager
- Stock Clerk
- Book Keeper

RESIDENTIAL JOB TRAINING TRACKS

- Residential Service Manager
- Residential Sales Manager
- Residential Marketing Manager
- Residential Installation Manager
- Residential Installer
- Residential Marketing Manager

- Dispatcher/Customer Care Manager
- Residential Technician
- Residential Selling Technician
- Residential Crew Chief
- Comfort Advisor

COMMERCIAL JOB TRAINING TRACKS

- Commercial Service Manager
- Commercial Sales Manager
- Comm. Marketing Manager
- Commercial Service Agreement Sales
- Commercial Design-Built Sales Consultant
- Dispatcher/Customer Care Manager
- Project Estimator
- Tech Rep Estimator
- Commercial Technician
- Commercial Installer

WHY WE ARE UNIQUELY QUALIFIED TO PROVIDE THIS SERVICE? Our clients are reporting that our Ready-Built HVAC Contractor Program's best practice website, bi-monthly blogging, social media connections, home page for each city and town they serve, and our online compete HVAC departmental tracks are fueling their business success, even in these recessionary times. It is all powered by GrowMyHVAC.com's online job training center a division of BSI with a 15+ year history of success in HVAC contractor business development, owner & staff professional development, and staff job training & education. We invite you to call this month's featured client testimonials by simply clicking [here](#).

WHAT'S IN IT FOR YOU?

We know what HVAC Contractors clients need in their businesses to be successful. In a market that seems to get more challenging every year, you need tools, proven business processes, work delivery forms and strategies to increase lead conversion rates and decrease the time dedicated to serving customers. **In fact, we not only can offer you the lowest cost way to do both, and with a 100% guarantee to your Success!**

"OUR AVERAGE SERVICE REPAIR AND INSTALLATION TICKETS HAVE GONE UP 166% AND WITH NO INCREASE IN PRICING COMPLAINTS. NICE!!"

DENNIS CLARK
PHOENIX COMFORT SYSTEMS, KY

Online education has grown tremendously over the past ten years. The increased accessibility of the

internet and the World Wide Web has created vast opportunities for non-traditional HVAC business education. The explosion of technology has also made HVAC business teaching outside the traditional classroom possible and has also provided HVAC staff with easy access to HVAC business systems, processes and related course material. **IT IS THE ONLINE READY-BUILT HVAC BUSINESS TRAINING CENTER ADVANTAGE!**

We are so sure of our proven Ready-Built HVAC Contractor program and its ability for fast positive revenue and profit results, that we include a written 100% money back guarantee our subscription! In fact, all that we require for this guarantee is that you and your staff participate in the *Ready-Built HVAC Contractor* business growth subscription program.

How can we uniquely offer this kind of a financial guarantee you ask? The simple truth is, we are so inexpensive and the typical profit gains huge that we easily 100% guarantee your success! In fact, we are priced for a 1-truck company client who are easily making an extra \$68 through GrowMyHVAC.com or for \$52 through best out of 7 HVAC wholesaler and manufacturing distributor partners dealer/client programs on their very first call of any week to recover cost of even our most expensive program subscription then they are NOT participating.

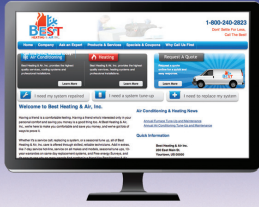
WHY THE READY-BUILT HVAC CONTRACTOR WORKS?

We customize a growth plan to your unique business needs. The Ready-Built Client Solutions Online Business Training Center's online education offers you more than just HVAC business-focused programs on your terms.

We give you the control to schedule your business improvement work. There are no job interruptions, travel expenses, or hours spent searching the campus map. You and your staff can attend classes anytime, anywhere 24/7. See our Training Center at www.GrowMyHVAC.com.

THIS DOCUMENT IS YOUR READY-BUILT HVAC CONTRACTOR USER GUIDE.

You may contact your assigned business fitness coach on his direct line, email or text him as found on the *Welcome Aboard* email growth strategy session GoToMeeting invite he sent you upon your subscription enrollment. Please do not hesitate to contact him at any time, or if you misplaced his contact information email then email our hot line info@GrowMyHVAC.com or call us 800-240-2823 for a private GoToMeeting demo on any aspect of our Ready-Built HVAC Contractor program.



Ready-Built HVAC Website/Social Media TRANSFORMATION PLAN

Pass out your business card to thousands of potential clients TODAY!

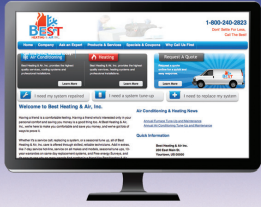
Within 3 business days of client submission of completed 1-page Website Set-up Form, we get you online with a professional internet storefront website and help guide you to establish a local professional presence for your HVAC services.

Client Business Benefit Objectives: (as reported by our enrolled clients)

- **Cost Effective Lead Generation:** Lowest cost means to pass out your company's business card 24/7 to 8 out of 10 buyers who go online to buy your service.
- **Present a Professional Image:** Your professionally designed HVAC website is a great way of instilling confidence and looking bigger than you may be. Your primary competitors may already have a presence on the Internet. Your website should allow you to show consumers that you are simply better.
- **Improve Customer Service:** Your online forms should allow customers to request quotations or ask for more information.
- **Gather Information and Generate Valuable Leads:** Rather than going out and getting leads, let them come to you.
- **Provide Instant Gratification:** People are busy and don't like to wait for information. Give them what they want, when they want it.
- **Great Recruiting Tool:** Whether you are looking for talent or posting job opportunities with your company, your website is a great recruiting tool for building your business.

During week #1:

1. We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.
2. Upon completion of session, Business Fitness Coach will send you a 1-page Website Set-up Form for you to download, complete, fax/scan, and send back to us for configuring and prepare for going online with your Website.
3. Client is notified when to redirect client's Website URL address's to our Server#1 and Server #2 server's addresses.
4. Client is also provided a password to access his Website's "Administration Portal" to post his own blogs, set up specials, and create home pages for each city/town he serves, and link his website to his Facebook and/or Twitter accounts.
5. Client is encouraged to enhance his website's local presence by downloading and following the Ready-Built HVAC Website User Guide Appendix section to create inbound links from search engine approved directories and social media sites.
6. Client is also given permission, during his active Ready-Built subscription, to copy and paste our website bi-monthly blogs to his other social media sites.



Retail Residential Service Department Business Systems TRANSFORMATION PLAN

Professionalize Your Residential Service Operations TODAY!

Within 4 weeks of start date, your Business Fitness Coach helps you establish the following business systems:

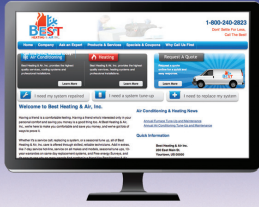
- Service Call Lead Generation Procedure
- Professional Service Call Handling Procedure
- Fix-Right Flat Rate Repair Upfront Pricing Guide
- Flat Rate Service Invoice
- Maintenance Agreement and Selling Process
- Truck Stock Inventory Control.

Client Business Benefit Objectives: (as reported by our enrolled clients)

- Close 2 out of 10 service calls to an accessory add-ons and or additional quoted work.
- Close 8 out of 10 non-service agreement customer repair calls to a sold service agreement.
- Close 8 out 10 catastrophic service repairs to a sold replacement job.
- 99% error free repairs resulting in 99%+ reduction in costly call backs.
- 400% increase in quoted jobs/replacements using call handling harvesting process.
- Average 2.25+ hours per residential repair call by adhering to best-practice repair pricing in compliance with published consumer and safety standards.
- Implement our written best-practice service-truck stock and restocking program.
- Deliver consistent quality on all residential demand service work per our written, best-practice demand service standard operating procedures.

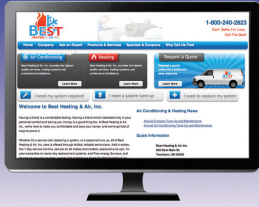
During week #1:

1. We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.
2. Upon completion of session, Business Fitness Coach registers you and your staff to access online business process and implementation training sessions.
3. Upon completion of session, Business Fitness Coach will send you the next week's Growth Strategy Session Workout meeting invite.



Retail Residential Service Department Business Systems TRANSFORMATION PLAN

4. Upon completion of session, Business Fitness Coach will send you a 1-page Fix-Right Flat Rate Service Repair Setup Form for you to download, complete, fax/scan, and send back to us for configure your residential Fix-Right service repair pricing.
5. Upon completion of session, Business Fitness Coach will send you which online sessions to take to obtain a complete service repair call handling system, to include customer system diagnostic forms, example flat rate service repair invoices, residential service agreements, and staff performance based pay.
6. You or your Service Manager, Dispatcher/Receptionist and Technician staff will simply go to our Online Solution Center home page, click top right "Client Login" to access these training tracks: (4-Dark blue session for dispatchers/receptionists) (4 – Dark green for technicians – can also be delivered live by coach)
 1. RS-STEP #1.0 Fix-Right residential flat rate repair price book set-up
 2. RS-STEP #2.0 Marketing residential service for profits
 3. RS-STEP #3.0 Proper customer care call handling and dispatching processes
 4. RS-STEP #3.1 Priority dispatching and dispatch board set-up
 5. RS-STEP #4.0 Professional service call handling process
 6. RS-STEP #4.1 Service call objective-getting ready-arriving to the call
 7. RS-STEP #4.2 Interviewing the customer and setting service call expectations
 8. RS-STEP #4.3 Problem diagnosis-informing customer of diagnosis
 9. RS-STEP #4.4 Executing the repair, tune-up, or service
 10. RS-STEP #4.5 Efficient demand service written standard procedures
 11. RS-STEP #5.0 Stocking service truck inventory for profits
 12. RS-STEP #6.0 Daily labor and opportunity conversion performance benchmarking
 13. RS-STEP #7.0 Paying Technicians/Tune-up Specialists for Profits
7. For our next meeting, client tries to complete and print out the following technician handouts:
 1. Order "Invoices", "Protect Service Agreement" and the "System Condition Report" from our preferred print vendor.
 2. Print out 1 copy per technician the Fix-Right Flat Rate Service Repair Price Guide.
 3. Download the RESCALC.xls file and estimate your annual service agreement price for 1 and 2 inspections service agreements. To obtain monthly service agreement pricing you divide the annual prices by 12. See session RS-1.0
 4. Dispatchers print out and edit the Professional Call Handling Script and present to Service Manager for approval. See session RS-3.0
 5. Print out 20 copies each per Technician of the 1-page "Service-Right System Diagnostic Form" to be used by technician on all service calls – See session RS-4.1
 6. Print out 1 copy per Technician of the "Service-Right Customer Awareness Handout" and have it laminated front and back of each page and spiral bound to hand out to customer during walkthrough – See session RS-4.2
 7. Print out 20 copies per each Dispatcher of the "Daily Call Tracker" to be used to debrief Technicians/Installers at end of call, job or end of day if not finished. See RS-6.0
 8. Print out and read for next meeting the Technician Performance Based Pay Plan – See RS-7.0



Retail Residential Service Department Business Systems TRANSFORMATION PLAN

During week #2:

8. For this next meeting, Business Fitness Coach will demo with management and get their approval on which of our Service Department Company Standards to help you implement.
9. We confirm which processes are to be implemented.
10. Upon completion of this session, Business Fitness Coach will send you the next week's Growth Strategy Session Workout to be conducted with Dispatchers/Technicians meeting invite.

During week #3:

11. For this next meeting, Business Fitness Coach will demo with the approved Professional Service Call Handling Processes and forms, repair and service agreement pricing methods, performance based pay, as well as, post call debriefing.
12. We clarify any questions and confirm Dispatchers/Technicians understanding of your Company Service Standards to be implemented.
13. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.
 - If you have enrolled in all 6 Departments, you also have our Human Resource Management Business Systems and therefore Business Fitness Coach schedules a meeting to implement our Performance Based Job Descriptions for your Service Manager, and Dispatchers/Technicians to tie them to your newly implemented Service Department Company Standards.

During week #4:

14. For this next meeting, Business Fitness Coach will discuss how best to set up your service truck stock inventory, control processes, and forms. See session RS-5.0.
15. Business Fitness Coach will discuss the implementation of demand service and service agreement written work delivery standards. See session RS-4.5.
16. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.

Performance Review Meetings:

17. We recommend that you schedule periodic Service Department reviews with your Business Fitness Coach to enable operational adjustments to help you to continue to meet your above Client Business Benefit Objectives.



Retail Residential Installation Department Business Systems TRANSFORMATION PLAN

Professionalize Your Residential Replacement Operations TODAY!

Within 4 weeks of client start date, Business Fitness Coach helps establish the following business systems:

- Replacement Lead Generation Procedures
- Professional HVAC Replacement Sales Call Handling Procedures
- Which HVAC/R Contractor Best Meets Your Needs questionnaire
- Upfront Replacement Proposal-Agreement and Selling Process
- Professional HVAC Replacement Sold Job Booking, Mobilization, and Installation Procedures
- Job Stock Inventory Control

Client Business Benefit Objectives: (as reported by our enrolled clients)

- Close 2 out of 10 sales calls to a sold accessory add-ons, or additional quoted work.
- Close 6 out of 10 Request for Quote sales calls to a sold replacement using the “One-Call Close” selling system.
- Close 8 out 10 catastrophic repair calls to a sold replacement on using the “One-Call Close” selling system.
- 99%+ error free replacement installation by implementing our proper replacement opportunity assessment, upfront pricing, sold job booking, as well as, our proper installation mobilization, work delivery execution, startup, test and verification, and daily job completion status reporting processes.
- Implement our written best-practice service-truck stock and restocking program.
- Deliver consistent quality on all residential replacement installation work per our written best-practice installation standard operating procedures.

During week #1:

1. We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.
2. Upon completion of session, Business Fitness Coach registers you and your staff separately to access online training sessions.
3. Upon completion of session, Business Fitness Coach will send you the next week’s Growth Strategy Session Workout Meeting invite.
4. Upon completion of session, Business Fitness Coach sends you a 1-page Home Comfort Certified System Flat Rate Replacement Pricing Set-up Form for you to download, complete and fax/scan and send back us for configuring per your financial requirements for your residential service repair pricing.



Retail Residential Installation Department Business Systems TRANSFORMATION PLAN

5. Upon receipt of your “Home Comfort Certified System Set-up Form”, your Business Fitness Coach will request you provide, as an email attachment, your equipment vendor equipment pricing for us to import into your “Home Comfort Certified System Flat Rate Replacement Price Guide”.
6. Upon completion of session, Business Fitness Coach will send you an email of what online sessions to take on our Client Solution Center to obtain our complete residential replacement installation price guide, professional service and sales call handling procedures, customer & system diagnostic forms, replacement proposal agreement, performance based pay, booking, mobilization, and installation delivery system.
7. You, your Installation Manager and your Selling Technicians/Comfort Advisors staff will simply go to our Online Solution Center home page, click top right “Client Login” to access these training tracks: (2 – Dark blue sessions are for your selling technicians/comfort advisors)
 1. RR-STEP #1.0 Home Comfort Replacement Flat Rate Pricing Guide Set-up
 2. RR-STEP #2.0 Marketing Residential Replacements for Profits
 3. RR-STEP #3.0 Professional Sales Call Handling Process
 4. RR-STEP #3.1 Closing more at higher margins with the with the “One-Call” Selling Process
 5. RR-STEP #4.0 Efficient written standard procedures for replacements
 6. RR-STEP #5.0 Stocking installation inventory for profits
 7. RR-STEP #6.0 Daily labor and opportunity conversion performance benchmarking
 8. RR-STEP #7.0 Paying Crew Chiefs/Installers for Profits
 9. RR-STEP #7.1 Paying Replacement Salespeople for Profits
8. For our next Growth Strategy Workout Session Meeting, client tries to complete and print out the following technician handouts:
 1. Order “Install-Right Proposal Agreement” from our preferred print vendor.
 2. Print out 1 per Selling Technician/Comfort Advisor the “Home Comfort Certified System” Flat Rate Installation Price Guide.
 3. Print out 20 of the 1-page “Install-Right System Diagnostic Form” to be used by selling techs and comfort advisors on all sales calls – See RR-3.0
 4. Print out 20 of the 2-page “Which Contractor Best Meets Your Needs” questionnaire. See RR-3.0.
 5. Print out and review for our next meeting the “Sold Job Booking Approval”, “Work Order Instructions”, “Start-up, Test and Verification” and “Customer Satisfaction Survey” Forms – See RR-4.0
 6. Print out and read for our next meeting the “Crew Chiefs/Installers Performance Based” Pay Plan – See RR-7.0
 7. Print out and read for our next meeting the “Selling Tech/Comfort Advisor Performance Based” Pay Plan – See RR-7.1

During week #2:

9. For this next meeting, Business Fitness Coach will demo with management and get their approval on which Installation Department Company Standards to have us help you implement.
10. Upon completion of this session, Business Fitness Coach will send you the next week’s Growth Strategy Session Workout to be conducted with selling technicians/comfort advisors meeting invite.



Retail Residential Installation Department Business Systems TRANSFORMATION PLAN

During week #3:

11. For this next meeting, Business Fitness Coach will demo to your Selling Technicians/Comfort Advisors your approved Home Comfort Replacement Price Guide, pricing methods, the professional sales call handling process & forms, installation proposal agreement, performance based pay, as well as, post call debriefing to identify sales opportunity conversion rates versus expectations.
12. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.
13. However, if you have enrolled in all 6 Departments, you also have our Human Resource Management Business Systems and therefore your Business Fitness Coach will schedule the meeting to implement our Performance Based Job Descriptions for your Installation Manager, Dispatchers, Selling Technicians/Comfort Advisors, and Installers to tie them to your Installation Department Company Standards.

During week #4:

14. For this next meeting Business Fitness Coach will discuss how best to set up your replacement job stock inventory control processes and forms. See session RS-5.0.
15. We also discuss the implementation of replacement installation written work delivery standards. See session RR-4.0.
16. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.

Performance Review Meetings:

17. We recommend that you schedule periodic Installation Department reviews with your Business Fitness Coach to enable operational adjustments to help you to continue to meet your above Client Business Benefit Objectives.



Commercial Service Department Business Systems TRANSFORMATION PLAN

Professionalize Your Commercial Service Operations TODAY!

Within 4 weeks of client start date Business Fitness Coach helps establish the following business systems:

- Service Agreement Lead Generation Procedure
- Professional Service Agreement Sales Call Handling Procedure
- AccuPro Commercial/Industrial Service Agreement Pricing Program
- Professional Service Call Handling Procedure
- Professional Service Proposal Agreement and Selling Process
- Truck Stock and Service Agreement Inventory Control

Client Business Benefit Objectives: (as reported by our enrolled clients)

- Obtain and implement targeted commercial list along with an effective business-to-business and outbound calling lead generation program.
- Close 6 out of 10 service agreement sales calls to a sold service agreement using the "One-Call Close" selling system.
- To obtain and implement proper commercial service agreement sales presentation, opportunity assessment form, AccuPro estimating, pricing and best-in-class commercial service agreement proposal documents for all HVAC systems categories.
- To obtain and implement proper commercial service agreement mobilization, maintenance delivery tasking and post call client performance reporting.
- Average 3.25 hours per commercial repair call by adhering to best-practice equipment repairs in compliance with published equipment manufacturers guidelines, industry and safety standards.
- Implement our written best-practice service-truck stock restocking and service agreement inventory control program.
- Deliver consistent quality on all commercial demand service work per our written demand service standard operating procedures.
- Deliver consistent quality on all commercial service agreement work per our written commercial service agreement standard operating procedures.



Commercial Service Department Business Systems TRANSFORMATION PLAN

During week #1:

1. We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.
2. Upon completion of session, Business Fitness Coach registers you and your staff to access online business process and implementation training sessions.
3. Upon completion of session, Business Fitness Coach will send you the next week's Growth Strategy Session Workout meeting invite.
4. Upon completion of session, Business Fitness Coach will send you a 1-page Fix-Right Flat Rate Service Repair Setup Form for you to download, complete, fax/scan, and send back to us for configuring per your financial requirements for residential service repair pricing.
5. Upon completion of session, Business Fitness Coach will send an email advising of which online sessions to take on our Client Solution Center to obtain our complete service call handling system, customer and system diagnostic forms, example flat rate service repair invoices, residential service agreements, and staff performance based pay.
6. You, your Service Manager, Commercial Sales Rep, and Dispatcher/Receptionist staff will simply go to our Online Solution Center home page, click top right "Client Login" to access these training tracks: (3-Dark blue session for dispatchers/receptions) (8 – Dark green for commercial sales reps)
 1. CS-STEP #1.0 AccuPro commercial service agreement pricing set-up
 2. CS-STEP #1.1 Pricing Demand Service for profits
 3. CS-STEP #2.0 Marketing commercial service for profits
 4. CS-STEP #3.0 Proper customer care call handling and dispatching processes
 5. CS-STEP #3.1 Priority dispatching and dispatch board set-up
 6. CS-STEP #3.2 Professional service sales call handling process
 7. CS-STEP #3.3 Closing more service agreements at higher margins
 8. CS-STEP #3.4 Understanding Building Owner-Operator Roles & Responsibilities
 9. CS-STEP #3.5 Assessing Your Company
 10. CS-STEP #3.6 Surveying Service Agreement Equipment-System Maintenance Requirements
 11. CS-STEP #3.7 Qualifying the real, worth and win of a service agreement deal
 12. CS-STEP #4.5 Efficient demand service written service standard procedures
 13. CS-STEP #4.6 Efficient service agreement written service standard procedures
 14. CS-STEP #4.7 Efficient Quoted Repair written standard procedures
 15. CS-STEP #5.0 Stocking service truck inventory for profits
 16. CS-STEP #6.0 Daily labor and opportunity conversion performance benchmarking
 17. CS-STEP #7.0 Paying Technicians/Tune-up Specialists for Profits
 18. CS-STEP #7.1 Paying commercial Sales Reps for Profits
7. For our next meeting, client completes and prints out the following technician handouts:
 1. Order the "System Condition Report" from our preferred print vendor. See session CS-1.0.
 2. Download "AccuPro" commercial service agreement estimating and pricing program, proposal documents, "Customer and Equipment Assessment Forms", the "AccuTask" technician maintenance tasking procedures. See session CS-1.0.



Commercial Service Department Business Systems TRANSFORMATION PLAN

3. Order commercial B2B owner occupied call list from our preferred list Broker. See session CS-2.0.
4. Download commercial service agreement sales "Warm Call Script" and "Commercial Selling Questions that Sell". See session CS-2.0.
5. Download and edit your company's Commercial Line Card, Prospecting Strategies, and Target Marketing Letters. See session CS-2.0.
6. Dispatchers print out and edit the Professional Call Handling Script and present to Service Manager for approval. See session RS-3.0
7. Download and review the "Mobilizing the Field Service and Dispatch Function". See session CS-3.1.
8. Download and edit "Commercial Service Agreement 1st Call PowerPoint Presentation". See session CS-3.2.
9. Download and review the "Benefits of Maintenance Agreements", "Customer and Equipment Survey Forms". See session CS-3.2.
10. Download and review "Introduction to the Commercial HVAC/R Industry". See session CS-3.3.
11. Download and review "Understanding Building Owner/Operator Roles & Responsibilities". See session CS-3.4.
12. Download and review "Assessing Your Company's Capabilities and Market Position". See session CS-3.5.
13. Download and review "Equipment/Systems and Visual Condition Evaluation Techniques", as well as, "HVAC/R System Surveying and Equipment Data Gathering." See session CS-3.6.
14. Download and review "Qualifying the Real, Worth and Win of Deal Opportunities". See session CS-3.7.
15. Print out 20 copies per each Dispatcher of the "Daily Call Tracker" to be used to debrief Technicians/Installers at end of call, job or end of day if not finished. See RS-6.0
16. Print out and read for our next meeting the "Technicians Performance Based Pay Plan" – See CS-7.0
17. Print out and read for our next meeting the "Commercial Sales Reps Performance Based Pay Plan" – See CS-7.1

During week #2:

8. For this next meeting, Business Fitness Coach will demo with management and get their approval on which of our Service Department Company Standards to have implemented.
9. We confirm which processes are to be implemented.
10. Upon completion of this session, Business Fitness Coach will send you the next week's Growth Strategy Session Workout to be conducted with Dispatchers/Technicians meeting invite.

During week #3:

11. For this next meeting, Business Fitness Coach will demo with the Dispatchers/Technicians your approved Professional Service Call Handling Processes and forms, repair and service agreement pricing methods, performance based pay, as well as, post call debriefing to identify labor productivity and service sales opportunity conversion rates versus expectations.
12. For this next meeting, Business Fitness Coach will demo with the Commercial Service Agreement Sales Rep your approved Professional Sales Call Handling Processes and forms and service agreement pricing methods, performance based pay, as well as, post call debriefing to identify sales opportunity conversion rates versus expectations.



Commercial Service Department Business Systems TRANSFORMATION PLAN

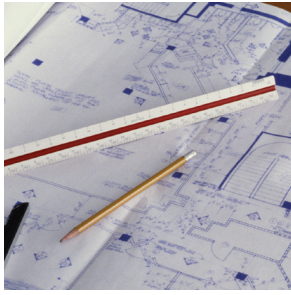
13. We clarify any questions and confirm Dispatchers/Technicians understanding of your Company Service Standards to be implemented.
14. We clarify any questions and confirm Commercial Service Sales Rep understanding of your Company Service Agreement Standards to be implemented.
15. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.
 - If you have enrolled in all 6 Departments, you also have our Human Resource Management Business Systems and therefore the Business Fitness Coach schedules a meeting to implement our Performance Based Job Descriptions for your Service Manager, Dispatchers/Technicians and Commercial Sales Reps to tie them to your newly implemented Service Department Company Standards.

During week #4:

16. For this next meeting, Business Fitness Coach will discuss how best to set up your service truck stock and service agreement inventory, control processes, and forms. See session RS-5.0.
17. Business Fitness Coach will discuss the implementation of demand service written work delivery standards. See session RS-4.5.
18. Business Fitness Coach will discuss the implementation of service agreement written work delivery standards. See session RS-4.6.
19. Business Fitness Coach will discuss the implementation of quoted service job written work delivery standards. See session RS-4.7.
20. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.

Performance Review Meetings:

21. We recommend that you schedule periodic Service Department reviews with your Business Fitness Coach to enable operational adjustments to help you to continue to meet your above Client Business Benefit Objectives.



Design/Build Project Department Business Systems TRANSFORMATION PLAN

Professionalize Your Design-Build/Project Operations TODAY!

Within 4 weeks of client start date Business Fitness Coach helps establish the following business systems:

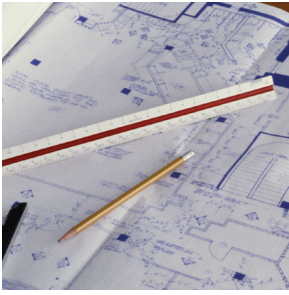
- Design-Build Lead Generation Procedure
- Professional Design-Build/Project Sales Call Handling Procedure
- ProjectPro Commercial/Industrial Project Pricing Program
- Professional Design-Build/Quoted Job Handling Procedure
- Professional Project Proposal Agreement and Selling Process
- Project/Job Inventory Control Process

Client Business Benefit Objectives: (as reported by our enrolled clients)

- Obtain and implement targeted design-build/project list along with an effective business-to-business and outbound calling lead generation program.
- 6 out of 10 design-build/project request for quote sales calls converted to a sold job using the “One-Call Close” selling system.
- Increase project close rates of 35% or more.
- To obtain and implement proper commercial design-build/project sales presentation, opportunity assessment form, ProjectPro estimating, pricing and best-in-class project proposal documents for all your negotiated HVAC project categories.
- To obtain and implement proper design-build/project mobilization, installation delivery tasking and post call or end of day job completion status and financial performance reporting.
- Average 42% sold job gross profit margin by adhering to best-practice equipment replacement of project installation compliance with published equipment manufacturers guidelines, industry and safety standards.
- Implement our written best-practice project stock inventory control program.
- Deliver consistent quality on all design-build/project work per our written project standard operating procedures.

During week #1:

1. We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.
2. Upon completion of session, Business Fitness Coach registers you and your staff to access online business process and implementation training sessions.



Design/Build Project Department Business Systems TRANSFORMATION PLAN

3. Upon completion of session, Business Fitness Coach will send you the next weeks' Growth Strategy Session Workout meeting invite.
4. Upon completion of session, Business Fitness Coach will send you a 1-page Fix-Right Flat Rate Service Repair Setup Form for you to download, complete, fax/scan, and send back to us for configuring per your financial requirements your residential service repair pricing.
5. Upon completion of session, Business Fitness Coach will send an email advising of which online sessions to take on our Client Solution Center to obtain our complete service call handling system, customer and system diagnostic forms, example flat rate service repair invoices, residential service agreements, and staff performance based pay.
6. You, your Construction/Project Manager, Commercial Sales Rep, and Dispatcher/Receptionist staff will simply go to our Online Solution Center home page, click top right "Client Login" to access these training tracks:
(3-Dark blue sessions for dispatchers/receptions) (8 – Dark green sessions for commercial sales reps)
 1. CP-STEP #1.0 ProjectPro Retrofit/Design Build Estimating and Pricing Program Set-up
 2. CP-STEP #2.0 Marketing Retrofit/Design-Build for Profits
 3. CP-STEP #3.0 Professional Sales Call Handling Process
 4. CP-STEP #3.1 Qualifying the "Real-Worth-Win" of Design-Build Opportunities
 5. CP-STEP #4.0 Efficient Retrofit/Design-Build Written Standard Procedures
 6. CP-STEP #5.0 Stocking service truck inventory for profits
 7. CS-STEP #6.0 Daily labor and Sales Opportunity Conversion Performance Benchmarking
 8. CP-STEP #7.0 Paying Retrofit/Design-Build laborers for Profits
 9. CP-STEP #7.1 Paying commercial Sales Reps for Profits
7. For our next meeting, client completes and prints out the following technician handouts:
 1. Download "ProjectPro" design-build/project estimating and pricing program, project proposal documents, "Install-Right Project Assessment Forms", the sales rep project opportunity assessment, estimating and pricing procedures. See session CS-1.0.
 2. Download and edit to your company the design-build/project prospecting strategies, and package of Installed-Right Solution Proposal Templates. See session CP-2.0.
 3. Order commercial B2B owner occupied call list from our preferred list broker. See session CP-2.0.
 4. Download and edit "Design-Build/Project 1st Call PowerPoint Sales Presentation". See session CP-3.0.
 5. Download and edit "Project Backlog Sales Report". See session CP-3.0.
 6. Download and review "Qualifying the Real, Worth and Win of Deal Opportunities". See session CS-3.1.
 7. Download and edit "Design Build-Retrofit Project Standard Delivery Procedures". See session 4.0.
 8. Print out and read for our next meeting the "Installers Performance Based Pay Plan" – See CP-7.0
 9. Print out and read for our next meeting the "Commercial Sales Reps Performance Based Pay Plan" – See CP-7.1

During week #2:

8. For this next meeting, Business Fitness Coach will demo with management and get approval on which of our Design-Build/Project Department Company Standards to have us help you implement.
9. We confirm which processes are to be implemented.



Design/Build Project Department Business Systems TRANSFORMATION PLAN

10. Upon completion of this session, Business Fitness Coach will send you the next weeks Growth Strategy Session Workout to be conducted with Dispatchers/Technicians meeting invite.

During week #3:

11. For this next meeting, Business Fitness Coach will demo with the Dispatchers/Technicians the Professional Design-Build/Project Call Handling Processes and forms, and project estimating and pricing methods, performance based pay, as well as, post call debriefing to identify installer labor productivity and commercial sales rep opportunity conversion rates versus expectations.
12. For this next meeting, Business Fitness Coach will demo with the Commercial Project Sales Rep your approved Professional Sales Call Handling Processes and forms and project pricing methods, performance based pay, as well as, post call debriefing to identify sales opportunity conversion rates versus expectations.
13. We clarify any questions and confirm Dispatchers/Technicians understanding of your Company Service Standards to be implemented.
14. We clarify any questions and confirm Commercial Service Sales Rep understanding of your Company Design-Build/Project Standards to be implemented.
15. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.
 - Typically, if you have enrolled in all 6 Departments, you also have our Human Resource Management Business Systems and therefore Business Fitness Coach schedules a meeting to implement our Performance Based Job Descriptions for your Sales Manager, Installers and Commercial Sales Reps to tie them to your newly implemented Design-Build/Project Department Company Standards.

During week #4:

16. For this next meeting, Business Fitness Coach will discuss how best to set up your service truck stock and service agreement inventory, control processes, and forms. See session CP-5.0.
17. Business Fitness Coach will discuss the implementation of demand service written work delivery standards. See session CP-4.0.
18. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.

Performance Review Meetings:

19. We recommend that you schedule periodic Design-Build/Project Department reviews with your Business Fitness Coach to enable operational adjustments to help you to continue to meet your above Client Business Benefit Objectives.



Financial Management Department Business Systems TRANSFORMATION PLAN

Improve your Cash Flow Management TODAY!

Within 4 weeks of client start date Business Fitness Coach helps establish the following business systems:

- Financial Budget and Labor Forecasting Procedures
- On-going Business Evaluation and Improvement Plans
- Inventory Control Written Standard Procedures and Forms
- Complete Collections and Accounts Receivable Written Delivery Procedures and Forms

Client Business Benefit Objectives: (as reported by our enrolled clients)

- Obtain a visual business management road map to the future success of your business.
- Quickly establish daily growth, spending, and operating benchmarks to help you proactively improve your businesses performance.
- Learn how to read a financial statement and how to break down your revenue and expenses by product/service to help you establish company pricing rates and policies.
- Be able to systematically improve revenue and profitability by driving business performance benchmarks in a positive direction.
- Learn the importance of protecting your business's cash payments and job related risks and liabilities and how to implement appropriate transaction document terms and conditions policies and procedures for all work categories.
- Learn how to implement proper inventory control policies and procedures for all work categories.
- Learn how to implement proper collections and accounts receivable policies and procedures for all work categories.
- Benefit objective is to improve profitability and competitiveness by pricing your work correctly, deliver consistent quality on all residential demand service work per our written, best-practice demand service standard operating procedures.

During week #1:

1. We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.
2. Upon completion of session, Business Fitness Coach registers you and your staff to access online business process and implementation training sessions.
3. Upon completion of session, Business Fitness Coach will send you the next week's Growth Strategy Session Workout meeting invite.



Financial Management Department Business Systems TRANSFORMATION PLAN

4. Upon completion of session, Business Fitness Coach will send an email for which online sessions to take on our Client Solution Center in order to obtain one or more of the above Financial Management Tools.
5. You, your General Manager, Accounting Manager, Bookkeeper and or Operations Manager staff will simply go to our Online Solution Center home page, click top right "Client Login" to access these training tracks:
 1. FM-STEP #1.0 Pricing for profits
 2. FM-STEP #2.0 Business Performance Benchmark Set-up
 3. FM-STEP #3.0 Invoice and Proposal "Risk & Liability" Protection Terms and Conditions
 4. FM-STEP #4.0 Implementing Inventory Control procedures
 5. FM-STEP #5.0 Implementing Collections and Accounts Receivable procedures
 6. FM-STEP #6.0 BudgetPro Financial Management and Labor Forecasting Program Set-up
 7. FM-STEP #7.0 Business Evaluation and Improvement Plan
6. For our next meeting, client completes and prints out the following technician handouts:
 1. Download, review and compare the Residential and or Commercial HVAC Business Key Performance Indicators to your businesses operations. See session FM-1.0
 2. Download, review and edit to your business the Pricing Policy and Procedures. See session FM-1.0
 3. Download, review and edit to your business the Pricing Policy and Procedures. See session FM-1.0
 4. Download and review "Financial Management and Control Processes". See session FM-2.0.
 5. Download proposal templates for Commercial Service Agreement, Design Build/Project and Lease Proposal document templates. See session 3.0.
 6. Download, review and edit to your business the Just-in-Time Inventory Control Process. See session FM-4.0.
 7. Download, review and edit to your business the "Accounts Receivable/Collections Standard Procedures. See session FM-5.0.
 8. Download, review and edit to your business the "BudgetPro Revenue, Expense and Labor Forecasting Program". See session FM-6.0.

During week #2:

7. For this next meeting, Business Fitness Coach will demo with management and get their approval on which of our Financial Management Department Company Standards to have us help you implement.
8. We confirm which processes are to be implemented.
9. Upon completion of this session, Business Fitness Coach will send you the next week's Growth Strategy Session Workout to be conducted with Financial Manager, Operations Manager, or Bookkeeper meeting invite.
10. For this next meeting, Business Fitness Coach will demo with the Financial Manager, Operations Manager, or Bookkeeper your approved Financial Management Processes and forms.
11. We clarify any questions and confirm with your financial management staff's understanding of your Company Financial Management Standards to be implemented.



Financial Management Department Business Systems **TRANSFORMATION PLAN**

12. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.
 - If you have enrolled in all 6 Departments, you also have our Human Resource Management Business Systems and therefore Business Fitness Coach schedules a meeting to implement our Performance Based Job Descriptions for your Financial Manager, Operations Manager, or Bookkeeper to tie them to your newly implemented Financial Management Department Company Standards.

During week #4:

13. For this next meeting, Business Fitness Coach will discuss how best to set up your financial management control processes, and forms. See session RS-5.0.
14. Business Fitness Coach will discuss the implementation of demand service and service agreement written work delivery standards. See session RS-4.5.
15. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.

Performance Review Meetings:

16. We recommend that you schedule periodic Service Department reviews with your Business Fitness Coach to enable operational adjustments to help you to continue to meet your above Client Business Benefit Objectives.



Human Resource Management Department Business Systems TRANSFORMATION PLAN

Increase your Staff's Motivation and Productivity TODAY!

Within 3 weeks of client start date Business Fitness Coach helps to establish the following business systems:

- Complete set of Performance Based Job Descriptions and Evaluations
- Employee Handbook
- Recruiting, Hiring, Training, Staffing, and Deployment Written Delivery Procedures

Client Business Benefit Objectives: (as reported by our enrolled clients)

- Implement performance-based job descriptions tied to your business systems and that double as tools for objective individual performance evaluation and corrective action planning.
- Implement an employee handbook that clearly explains your workplace policies.
- Learn how to create job analysis, job descriptions, implement effective recruiting strategies, screening the applicant resume, conducting an effective interview, screening interview and employment application questions, develop competency based interview questions, conduct post interview activities, personality assessment, making the job offer, evaluating training requirements, where to best provide and sources of training materials, core and skill specific competencies evaluation, recommended activities for self-development.

During week #1:

1. We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.
2. Upon completion of session, Business Fitness Coach registers you and your staff to access online business process and implementation training sessions.
3. Upon completion of session, Business Fitness Coach will send you the next week's Growth Strategy Session Workout meeting invite.
4. Upon completion of session, Business Fitness Coach will send an email for which online sessions to take on our Client Solution Center to obtain one or more of the above Human Resource Management Tools.
5. You or your General Manager, Human Resource Manager, and or Operations Manager staff will simply go to our Online Solution Center home page, click top right "Client Login" to access these training tracks:
 1. HR-STEP #1.0 Implementing Job Descriptions and Performance Evaluations
 2. HR-STEP #2.0 Employee Handbook Set-up
 3. HR-STEP #3.0 Recruiting, hiring, staffing, and deployment



Human Resource Management Department Business Systems TRANSFORMATION PLAN

6. For our next meeting, client completes and prints out the following technician handouts:
 1. Download, review and edit to your business the Job descriptions. See session HR-1.0
 2. Download, review and edit to your business the Never Hire a Bad Salesperson Again article. See session HR-1.0
 3. Download, review and edit to your business the Staff Confidentiality Agreement. See session HR-1.0
 4. Download, review and edit to your business the Employee Handbook template. See session HR-2.0
 5. Download, review and edit to your business the Employee Job Evaluation. See session HR-3.0
 6. Download, review and edit to your business the Job Analysis. See session HR-3.0

During week #2:

7. For this next meeting, Business Fitness Coach will demo with management and get their approval on which of our Human Resource Management Department Company Standards to have us help you implement.
8. We confirm which processes are to be implemented.
9. Upon completion of this session, Business Fitness Coach will send you the next weeks Growth Strategy Session Workout to be conducted with General Manager, Human Resource Manager, and or Operations Manager meeting invite.

During week #3:

10. For this next meeting, Business Fitness Coach will demo with the General Manager, Human Resource Manager, and or Operations Manager your approved Human Resource Management Processes and forms.
11. We clarify any questions and confirm with your General Manager, Human Resource Manager, and or Operations Manager understanding of your Company Human Resource Management Standards to be implemented.
12. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.

Performance Review Meetings:

13. We recommend that you schedule periodic Human Resource Management Department reviews with your Business Fitness Coach to enable operational adjustments to help you to continue to meet your above Client Business Benefit Objectives.