

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:

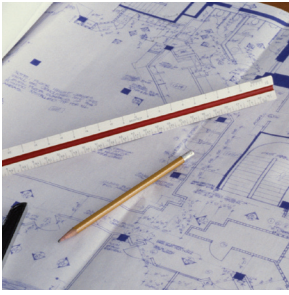
- Design-Build Lead Generation Procedure
- Professional Design-Build/Project Sales Call Handling Procedure
- ProjectPro Commercial/Industrial Project Pricing Program
- Professional Design-Build/Quoted Job Handling Procedure
- Professional Project Proposal Agreement and Selling Process
- Project/Job Inventory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

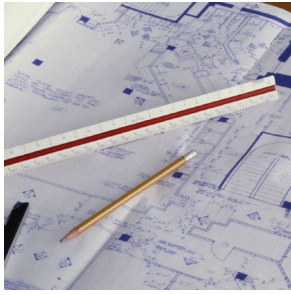


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3. Upon completion of session, Business Fitness Coach will send you the next weeks' Growth Strategy Session Workout meeting invite.
4. Upon completion of session, Business Fitness Coach will send you a 1-page Fix-Right Flat Rate Service Repair Setup 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.



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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.