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Summit 2020: Why Coaching Is So Important for Your Technical Team

Summit 2020: Coach Managers on Implementing High-Performance into Your Business

Why Pressure is the First Step to Airside Performance

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HIGH-PERFORMANCE HVAC TODAY™



MANAGEMENT:

Why Coach Your Technical Team?

If you want to prove your team is delivering the comfort, efficiency, and safety you promise, you MUST coach them as to how to do it. Here is why this is so important.

MANAGEMENT:

Coaching Your Managers on Implementing High-Performance

Contractor Dave DeRose shares his insights on how your managers are key to having a successful Performance-Based Contracting™ company.



TECHNICAL:

Take the PATH to Airside Performance: Part 2

David Richardson discusses what it takes to begin static pressure measuring and testing. This is the first step on the Performance PATH.



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Get the Most From Virtual Conferences and Trade Shows



Mike Weil is editor-in-chief and director of communications at National Comfort Institute, Inc. You can reach him at ncilink.com/ContactMe

Virtual conferences are just as valuable as in-person events if you know what to look for and take the right steps to make the most of the experience. The fact is, virtual events don't diminish the power of peer-to-peer networking or group learning, they just change things.

Here are four advantages to any virtual event:

Cost and Time Savings - Virtual events eliminate the costs for travel, hotels, and food. Plus the registration fees are typically less.

Convenience and Accessibility - You can join an online conference from anywhere there is an Internet connection on any device.

Attend All Sessions - For the most part, virtual conferences are set up so attendees won't miss any of the sessions or other events. This is usually done by recording sessions and making them available to attendees at no extra cost.

Comfort - What's more comfortable than attending from a favorite chair in your home or office?

CHECKLIST TO ENHANCE YOUR EXPERIENCE

The fact is a virtual conference is different and requires a few modifications in approach. Here are a number of tips that can help:

Put it on Your Calendar - Add the virtual conference to your calendar as soon as you sign up and set alerts for a day or two in advance.

Get Full Access - The price is often much lower than a live event, so why not get access to everything? For example, instead of just registering for the trade show portion, why not register for the full event and have access to everything! You still save money over the cost of an in-person event.

Check Your Email - After registering, you will usually receive an email confirmation with the information you need to attend. If you don't see it immediately, check your spam folder or, in

Gmail, your Promotions tab.

Prior to the conference watch for reminder emails, even if you think you have what you need to attend. Change happens and the organizer sometimes sends information about newly added sessions, networking opportunities, or crucial updates as the event date approaches.

Make It a Priority - Take virtual conferences seriously. Block time on your calendar to show up for live sessions and don't overbook.

Turn Off Distractions - It's too doggone easy to react to notifications that pop up on your phone or computer. Turn notifications off so you can stay focused on the session.

Use Interactive Features - These include Polls, Chat, Q&A, and even raise-your-hand features that are part of the virtual experience. Sometimes there is even a mobile app that you have access to. All of them enable you to interact with others attending the session, the overall event, as well as speakers, panelists, and so on.

Take Advantage of Virtual Networking Opportunities - Join social media chatter by skimming through conference hashtags for commentary from fellow attendees. Share your comments too. In many instances, you can post through the conference software as well as Twitter and Facebook.

Take Notes and Review Them - You won't remember everything you learn in each session, so be sure to jot down some notes and then review them later to jog your memory.

Make Connections - Pay attention to people who ask the best questions or share the most insightful comments. Look them up and connect via social media. Then follow-up using email.

You can take full advantage of any virtual event by committing time to attend, participate, and connect. Isn't that the whole reason for attending a conference in the first place? 

BOSCH GLM50C DISTANCE METER

Have you ever had a job that had to stop because the physical dimensions of the space were not accounted for when designing a system?

The Bosch LM50C Distance Meter is a laser distance measuring device with application-based support.

By using the GLM50C and a tablet or smartphone with *Bosch's GLM Measuring Master app*,

you can enter measurements directly into an image. The app is available at both the **Google Store** (ncilink.com/GLMApp1) and the **Apple**



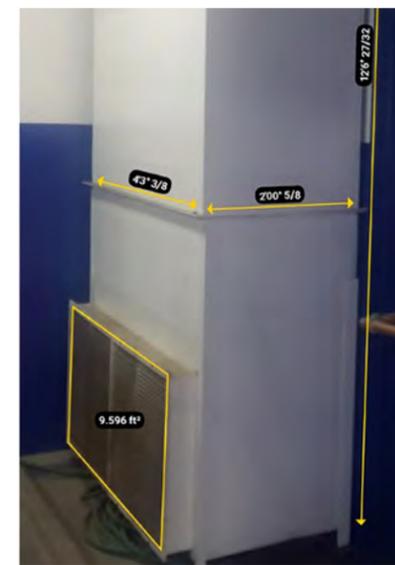
App Store (ncilink.com/GLMApp2).

The laser distance measurement has a range of 165 feet at an accuracy of 1/16 of an inch. That range is decreased outdoors in sunlight.

Functions in the device can calculate line-of-sight linear feet, square footage, and cubic feet. Other functions are available such as level and wall area.

There are a number of ways you can use this tool. For example, with it you can:

- ◆ Do sheet metal ductwork takeoff and layout



- ◆ Gather more accurate and clear data for system designers
- ◆ Measure cubic feet for air changes per hour calculations
- ◆ Measure distances for crane lifts
- ◆ Calculate filter area
- ◆ Calculate area for traverse calculations
- ◆ Create installation location images for your installation crew

- ◆ Reduce the need to revisit job sites to take additional measurements.

More information can be found at ncilink.com/BoschGLM50C.

— by Justin Bright, NCI Field Coach & Trainer

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A Revolutionary Approach to the HVAC Business

Charlottesville, Virginia is a place of historical significance. It was home to two U.S. presidents, Thomas Jefferson and James Monroe. Plus, a mere 26 miles northeast, is the hometown of a third president, James Madison, in the town of Orange.

Charlottesville is also the seat of Albemarle County. Cool fact: Albemarle was named after the British Queen Consort, Charlotte of Mecklenburg-Strelitz – wife of King George III.

Another cool fact: Albemarle County is also the namesake for Albemarle Heating and Air, Inc., a residential HVAC firm that employs around 80 people.

Founded in 1988 by Tom Kavounas, Albemarle's mission was to deliver the best job possible for a fair price. Kavounas never believed in getting jobs at all costs – he was always focused on delivering value.

EVOLUTIONARY CHANGES

In the beginning, Kavounas' company focused primarily on new construction. If you think about it, 32 years ago new homes were being built everywhere, many of them by small builders. One of Kavounas' early customers managed a small home-building firm. His name is Ralph Sachs and that company built between 25 to 30 new houses per year.

In those days, as a builder, many trades called on Sachs and tried to land contracts based on giving him

the cheapest price.

"My attitude is that I'm never really interested in cheaper," Sachs explains. "I'm interested in better. Tom Kavounas called on me and his pitch was different. He said he couldn't necessarily do it cheaper, but he could do it better and he would guarantee that my customers would be comfortable in their new homes.

"He was the one guy I took the time



Tom Kavounas (left) and Ralph Sachs of Albemarle Heating and Air.

to talk with. Albemarle wound up doing all my work. Over time Tom and I became very close and one thing led to another and I came to work for him in 1999 or so."

How's that for a revolutionary change? It's not every day that a home builder goes to work for an HVAC contracting firm. Sachs says as larger home builders moved into the area who focused more on price than value, Albemarle shifted its focus to custom new construction/renovation, and residential service and replacement.

Kavounas adapted to those changes by expanding both the service and

replacement departments. He changed their customer base so that today more than 80% of the business is in residential service and replacement. The other 20% is custom residential new construction, renovations, and a little light commercial, according to Sachs.

MANAGEMENT CHANGES

When Ralph Sachs joined Albemarle, he began in a sales position. At that time, Albemarle was still heavily involved in new construction and that was Sachs' strength. His initial focus was on new construction sales. Eventually, he too began working more in replacement sales and helped to build up that side of the business.

"Around 13 or 14 years ago I left Albemarle and went to work for Lennox Industries as a territory manager. It was just time for a change for me and I left on very good terms. Albemarle became my customer, so on some level, I never really left," Sachs explains.

"I worked for Lennox for not quite two years and found I missed the contracting side of the business. Tom Kavounas wanted me to come back, I wanted to come back, and eventually, we made that happen."

When he rejoined Albemarle, he did so as the sales manager. Some years later, Ralph Sachs became the general manager and remains so to this day.

In 2015, Kavounas wanted to reduce his daily involvement and, according to



Sachs, he sold Albemarle to his employees (it is now an Employee Stock Option Plan or ESOP). Kavounas is still involved and remains the president of the company's board of directors.

THE IMPORTANCE OF TRAINING

Since Kavounas founded Albemarle Heating, his mission was to provide the best value to customers for a fair price. From day one, Albemarle focused on customer comfort which always included the ductwork connected to their equipment.

But to do all of that required Kavounas and his team to be at the top of their game and he understood that required training. This is a philosophy that Ralph Sachs continues to this day.

He says part of that is making the Performance-Based Contracting™ approach a part of who Albemarle Heating is.

"We believe in and practice the National Comfort Institute (NCI) approach to system diagnostics, testing, and repair. Our challenge is to reinforce NCI best practices day in and day out."

Sachs adds his technicians take static pressure measurements on every call. They also do a basic duct analysis when they replace a system.

"Plus, all my guys are NCI-trained and certified in carbon monoxide (CO) and combustion analysis. But we still have not taken full advantage of the ComfortMaxx™ software and some of the other tools NCI provides. We understand the benefits of implementing what NCI

teaches and are committed to using what we've learned."

DIFFERENTIATION WORKS

For the team at Albemarle, the secret sauce to their success is standing out from the crowd. It's about creativity. It's about finding the best ways to improve their customers' lives. Much of that effort revolves around the duct systems which, according to Sachs, has been the case since day one.

But it's not just about testing and diagnosing. He says sometimes differentiation can be as simple as putting what he calls "pump-ups" under outdoor heat pump units. Pump-ups are feet which raise the outdoor unit so that in winter when a heat pump goes into defrost mode and creates water melt (that then flows out to the ground), which keeps the heat pump raised above it.

"You don't want the unit sitting on the ground in all that water in the winter. So, we raise the units six inches off the ground," Sachs explains.

"We are also one of the very few companies to use a duct blaster for measuring duct leakage. We then find and seal those leaks."

Sometimes differentiation comes in the form of how you explain technicalities so customers can better understand them without their eyes glazing over.

For example, Sachs tells a story of how, when he first joined Albemar-

le, he just couldn't grasp the idea of what static pressure is. No one at Albemarle could explain it in a way that helped him understand.

"Then I attended one of NCI's air-flow classes taught by Rob Falke. During class, he blew up a balloon, held that up so the class could see it, and said that is an example of static pressure. The light bulb went off for me and I finally got it. That training and the other classes I took with NCI gave me a pretty good foundation for how statics work and, maybe even more importantly, how to talk about it with customers," Sachs explains.

NCI has been training the team at Albemarle almost from the beginning of NCI's existence and continues to do so today. Ralph believes those skills have led the company to the successes they enjoy today.

PANDEMICS AND THE ALBEMARLE WAY

Fact: every single business organization in the U.S. has been impacted by the outbreak of the Corona-19 pandemic. For Albemarle Heating, Sachs says that meant making tough decisions to keep the company alive and that meant losing some employees on the service side of the business who had to stay home.

"Like so many businesses, we are off-plan financially compared to this time last year. In addition, we had one of the mildest winters in a long time here."



Albemarle maintains their own sheet metal shop on site.

with the customer.”

Some of the strategies the Albemarle team uses to overcome this deficit is meeting with customers over Zoom. They also chat with them on the phone. Sometimes they have customers use their mobile devices to show the technicians their systems, and even operate the thermo-

stat remotely.

“Of course we also all wear booties and facemasks, wear gloves when necessary, wipe down all our equipment, and clean up when we are done with our work. We enforce practicing social distancing with our technicians,” he says.

He says COVID-19 changed how they communicate because it prevents the team from sitting face-to-face and sharing things with customers.

“Social distancing and having to wear masks has created social barriers that didn’t exist before, so we must be creative in how we “connect”

“As a result of the pandemic, we now get a written approval on every service call. We can sign off for them if that is what they’d prefer. All customers are different. Some have no concerns about us being in their homes and others are completely concerned.”

In the end, the team at Albemarle focuses on whatever the customer needs and continues its tradition of providing value for a fair price – something their customers seem to appreciate and desire. That is their revolutionary approach to customer service.

It is for these and many more reasons that Ralph Sachs and the team at **Albemarle Heating and Air**, Charlottesville, VA are the focus of the *September 2020 Contractor Spotlight*. Congratulations to the entire team. 



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Why Coaching Is So Important for Your Technical Team

Talk is cheap, but action moves mountains. How do you motivate a technical team to do something new? Companies around the country often struggle to implement new procedures into their business. They get tired of the fight and eventually give up.

Teaching a technical team can be difficult. Especially if you add unnecessary obstacles. We can all agree that no two technicians are the same and your style of leading will need to constantly change. Teams need a leader, someone who is willing to do the same work that’s expected of them.

When you struggle with a team that doesn’t want to do a task, ask yourself whether you’d be willing to do it yourself. If the answer is yes, then you’re in the right place.

Former marine drill instructor, movie actor, and motivational speaker R. Lee Emery – aka Gunny (ncilink.com/RLEmery) – stated, “you will not laugh, you will not cry, you will learn by the numbers, I will teach you.”

Gunny stated this perfectly. He didn’t say ‘tell’ you. Instead, he used the word ‘teach.’

That is the key. You need to coach your technical teams verbally and teach them actively. But first you must understand all the principles and skills that you expect them to use in the field.

Once you’ve got a grasp of the information, share it with your team and practice with them. Set aside an hour a week to focus on one specific topic.

Be sure to help your team when they need it. If they need you at the job, go there and use that moment as a teaching opportunity to make them better.

Stop being a boss and become a leader.

WHAT YOU’LL TEACH YOUR TECHNICAL TEAM

Here are six skills team members need to know and be confident in. These include how to:

1. Install static pressure test ports – Installing test ports is not difficult. However, it can be intimidating for technicians to do the first few times. Show them how and where to install test ports. Even go a step further and allow them to practice on used equipment in your shop to help their confidence grow.

2. Locate and document the static pressure rating – Equipment nameplates have more information on them than most realize. This is where manufacturers post the equipment’s maximum rated total external static pressure (TESP). The nameplate provides a guideline to what TESP the fan should not exceed.

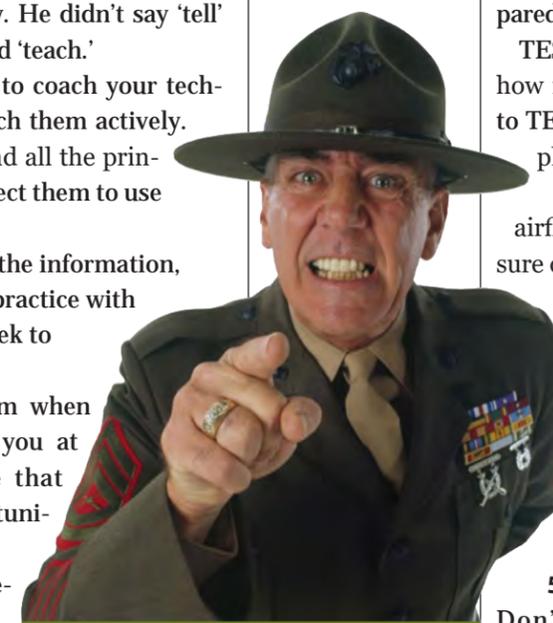
3. Measure total external static pressure – TESP is the pressure measured in and out of the equipment, then added together and compared to the equipment rating.

TESP will also help your technicians determine how much airflow the fan produces. In addition to TESP, they’ll take the fan size and speed, then plot out the fan airflow.

4. Measure pressure drops – Finding airflow restrictions requires measuring pressure drops across coils and filters. Static pressure measurement across components is as simple as measuring air where it enters and exits the component, then subtracting the lower number from the higher number. The tech compares that pressure number to a static pressure budget (ncilink.com/PSIBudgets). From that he or she can then see if the component is the issue.

5. Measure duct system pressures – Don’t forget about the duct system. Single

“YOU WILL NOT LAUGH, YOU WILL NOT CRY, YOU WILL LEARN BY THE NUMBERS, I WILL TEACH YOU.”





measurements can be taken in return and supply plenums. No math is needed here.

That one measurement tells you how restrictive that side of the duct system is. Then your tech can compare their measurement to a static pressure budget which helps determine if the duct system is restricted.

We'll discuss static pressure budgets a little bit later.

6. Document the test results – You need to write test results down to show what areas of the system need to be focused on.

Also, use the numbers to show and explain to the customer where the greatest system concerns are.

HOW TO DIAGNOSE

To diagnose each potential problem, you need to teach your team how to compare what they measured to either a rating the manufacturer gives the equipment or a percentage they can

apply in the field.

Your technicians will use the measured TESP and compare it to the manufacturers' recommended TESP rating. When measured TESP is over the rating, there are components restricting airflow. Knowing this, technicians can begin measuring components throughout the system to find the problem(s).

It's important to coach your team about the NCI static pressure budgets. This will give them the ability to create percentages based on the fan's maximum total external static pressure rating. Once they achieve this in the field, they'll compare each pressure drop measurement to the budgets they've created. When their measurement is

over the budget, that will tell them renovation is needed.

In addition to finding airflow restrictions, you'll coach your teams on how to plot fan airflow. This is done using the actual TESP, fan size, and fan speed.

By using the manufacturer's fan table they have everything they need to plot fan airflow. The fan table is provided by the manufacturer but sometimes is hard to locate. When the manufacturers' table is not accessible you can use the *NCI Generic tables*.

Your technicians can now compare the fan-plotted airflow to what the equipment required airflow is supposed to be based on the outdoor tonnage. When fan-plotted airflow falls under or over 10% of the equipment's required airflow, renovations will be needed.

RENOVATION PRESENTATION

Testing and diagnostics have very little value to your customer or to you if the results aren't shared. It's important to stress to your team that these presentations should not be too technical. Your customers will not, for the most part, understand what you're talking about. Remember, their main concern is whether the problem can be fixed.

You can always find a way to explain to your customers the problems with the HVAC system by relating it to something they can understand.

For example, most customers have had their blood pressure taken and know

what it means if the reading is too high.

Compare static pressure to blood pressure. High static pressure in the ductwork is the same as high blood pressure in the human body. The higher it goes, the more risk of failure.

INSTRUMENTATION

To take measurements and obtain the readings we are talking about in this article, you'll need a static pressure test kit (ncilink.com/SPTest-Kit). HVAC Industry technicians typically use a gauge like the manometer (ncilink.com/EBT730) or Magnehelic (ncilink.com/magnehelic) to measure static pressures.

The manometer is great for new-age techs because this instrument is quick, easy to use, and can communi-

cate to smartphones via apps.

But if you're old school and prefer a tried-and-true instrument, then pick up a Magnehelic gauge. Magnehelics also measure static pressure but are better from a sales point-of-view because of their visual display. This feature helps you better explain static pressure issues to your customer.

Don't forget some of the accessories you'll also need, including tubing and static pressure tips. The tubing connects the static pressure tip to the manometer. You'll also need a way to install test ports, so that means having a drill bit with a protective sheath or a step bit.

The sheath is used with standard drills and is purely for safety. It stops the bit from penetrating too deeply into the ductwork and damaging in-

ternal components.

At the NCI Virtual Summit (goto-summit.com), we will go into more detail on how you get your technical team to understand and properly perform their test measurements. We'll also discuss other measurements that can be taken so you and your team can find and solve even more issues with the systems you run into.



Casey Contreras is a trainer and field coach for National Comfort Institute. If you would like Casey to send you a link to a free App for your phone to quickly determine the airflow of residential fans in the field, email Casey at ncilink.com/ContactMe or call him at 657-227-6188. To find more free downloads and information, go to NCI's website at NationalComfortInstitute.com.

See Casey Contreras During the All-New Virtual Summit 2020

The **High-Performance HVAC Summit 2020** is happening on October 5-7. This year it will be held live, online – a virtual event. NCI Field Trainer Casey Contreras is one of four presenters showcasing the importance of coaching your team to high performance and this article is based on his upcoming session.

This online, live Summit will include all the same events normally held during past in-person Summits. This includes our **Virtual Tradeshow** (where you can learn about the latest products and services from our industry partners).

Virtual Summit 2020 will also feature several general session speakers, a special contractor panel discussion, and the presenting of our coveted NCI contractor and individual awards.

Virtual Summit 2020 offers you and your team the opportunity to not only hear from some of the Performance-Based HVAC Industry's finest, but also a chance to virtually network with like-minded contractors from across the nation.

Learn more about the **Virtual High-Performance HVAC Summit 2020** online at GoToSummit.com.



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Coaching Managers: *Implementing High-Performance into Your Business*



I was standing on the sidelines of a **Doak Walker** (ncilink.com/DoakWalker) youth football championship game that my third-grade nephew was playing in. My nephew's team had a little monster of a defensive lineman who could easily overpower any other player in the league.

The coach on the other sideline had instructed his line to triple-team this player and had stopped his effectiveness.

I asked my nephew's coach if I could "coach up" his defensive line and he said I could. I called the two defensive tackles over and asked where they were lining up and after they told me I instructed them to switch where they lined up every down.

The other team became confused and devastated because they did not know who to block, so almost every play going forward was stopped for a loss in the backfield and our entire line was coming through like the dike had broken.

I learned from my experience in coaching many youth sports that coaching was a great way to lead any group or individual into greater performance and results. I can attest to the positive effect that the coaching-type of leadership will have on your business and your life as well.

When it comes to "coaching up" your team, you need to start with the basics. I am a firm believer in studying the exceptional performance of

any coach or team and try to determine what the secret is to their success.

THERE IS NO "I" IN TEAM

The greatest example of outstanding coaching, in my opinion, is that of **John Wooden** (ncilink.com/JWooden). His UCLA Bruins won 10 NCAA basketball championships in 12 years, and in those 12 years, he was always in the running (even the two years he was not in the championship).

Another interesting fact: Wooden never faced the same team in the final game.

No other team in the nation would rise to be his competition.

When you look at his teams, I would wager that unless you are a huge NCAA basketball fan, you can only name two players he coached. One of those, Bill Walton, tells the story of his first day as a freshman when John Wooden came out, sat them down, and proceeded to teach them how to put on their shoes and socks. Google that story as it is a great illustration of how Wooden coached.

Bill was also the player who decided to let his hair get long and grow a beard. Wooden told him that was his right to do so and he would surely miss him. Walton stayed and submitted to the coach's authority.

You can also make this happen in your business as well. Wooden focused on fundamentals and building character in his players as well as being there for them. When he required something of the team, they believed in what he said and responded. Sounds like a great way to run your business, right?

MORE THAN MENTORING

Coaching your team to win championships is more than just being a mentor, it is also being

aware of problems as they develop in day-to-day operations and not waiting for the Profit-and-Loss statements to realize you are not winning.

That is a little like trying to fix your program after the final whistle blows and you are sitting at home watching the next round of the playoffs.

I do believe you need to be financially sound and educated in the numbers. But what if you could see profit potentials or loss each day at 9:00 AM or 1 hour after your start time?

What if you developed the ability in yourself to see a team member in distress and who needed a little coaching up? Or to see a team member who just does not fit and needs to be moved either internally or externally? What if you could build a team that won awards every time they competed?

Now as I ask these questions, I realize that even John Wooden missed

two years of the 12 in his historic run, but I think we would all take that type of "failure" as a great improvement.

YOUR BIGGEST COMPETITOR IS YOU

When discussing the HVAC industry and coaching of your team, one thing that must be pointed out is that you rarely have anyone to compete against other than yourself.

There may be another company in your area that you compete with for projects and customers, but they are not lined up outside your shop to keep you from producing. They are not trying to tackle your best tech from fixing a system or blocking the shot of your install team.

Normally only you and your team can oppose the production and success you desire. Now, I can just feel everyone thinking about how the internet



and difficult clients are roadblocks, but even these issues cannot stop you from producing or serving your customers.

Like a good coach, you need to watch your day develop from the sidelines and make adjustments that will produce scores.

I always tell folks that I do not mind working. But I am lazy by nature, so if I can find an easier way to produce results, I will do that.

Would you love to make the same or more profit with less conflict?

Think about this: How would Wooden deal with the tech who forgot to turn on the disconnect to the condensing unit and left a good customer without cooling in August? Or the install crew that left the door open and the dog got out, or did a poor job of cleaning up after they finished? I can assure you that those players corrected that type of performance or they did not play for John Wooden.

TAKING FIRST STEPS

The first step in this transformation is to work on your skills as a manager and become the true winning

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coach of your team. This is not accomplished by buying a new software program or some new piece of equipment. You cannot make this change by using a new supplier with lower prices or promised service that never materializes. This only happens when you work on your skills as a coach.

Many company owners in this industry started as great installers, technicians, or even supervisors and decided to be in business for themselves. Just as you did not start your first day on the job knowing what it took to install a new system, you did not become an owner and know all it takes to run a profitable and thriving company.

If you played any sports in school, you practiced many hours on technique and skills for that sport. Eric

Clapton did not just pick up a guitar and begin to play great riffs without practice. The saying that practice makes perfect was a mantra many coaches used, but the actual statement is perfect practice makes perfect.

I will always believe in Performance-Based Contracting™. I know that should mean much more than systems that are at .5 inches static pressure and 90% or better combustion efficiency.

Think about what your business would look like if we could remove some of the static pressure from poor performance and increase our efficiency by making the entire company work smarter not harder.

Coaching as a manager or owner can create that culture in your com-

pany. The desired outcome is to see each team member take responsibility and pride in the company as well. In the west, we call that "Riding for the Brand." I have been told that in Canada it is "Skate for the Colors." Sounds to me like there was a great coach at the head of those teams. 



Dave DeRose founded Masterworks Mechanical in Craig, CO in 1988. At the time, he was a master plumber with experience in plumbing, heating, air conditioning, and refrigeration. He grew the company over the years and eventually

sold it to employees Victor and Amy Updike in 2015. Dave remains active in and a servant leader for the HVAC Industry, particularly the High-Performance Contracting™ segment.

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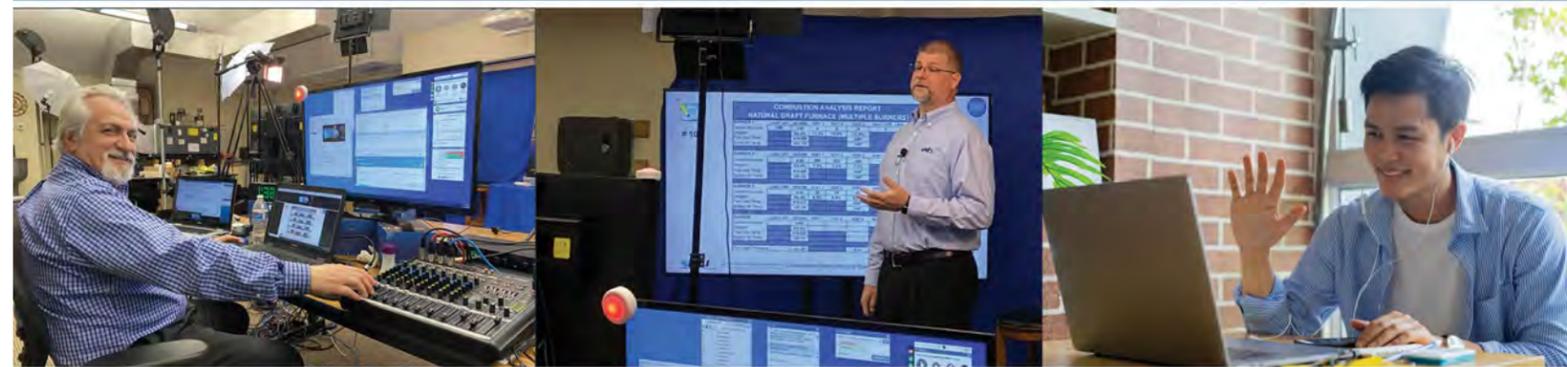
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Performance-Based Contractors from across North America will converge online to learn, share, build relationships, and explore new opportunities, products, and services. This 3-day information-packed conference is the only event of its kind completely focused on High-Performance HVAC.

Summit is open to all HVAC professionals. It's become the gathering place for like-minded people to learn from and share knowledge with fellow high-performance professionals.

If You Don't Measure, You're Just Guessing!™

NCI'S 2020 VIRTUAL SUMMIT

Coach Your Team To Success

This year's High-Performance HVAC Summit focuses on coaching your entire team. From the opening session through every workshop, you will learn how to coach your team members in specific areas that will help bring them together as you integrate performance in your company.

Action-Packed Conference!

GENERAL SESSIONS

Each day NCI leadership will bring you up to speed on new programs available this year, the state of our industry, and looking forward into 2021 and beyond.



PANEL DISCUSSION

Several High-Performance Contractors will share how they are overcoming the challenges of running a service business during the COVID-19 crisis.



IDEA MEETING

All contractor attendees are invited to this event where you can share one or more lead generation and sales techniques that are working for you. Just register online and submit your ideas (\$20 entrance fee). The best ideas split the pot for great cash prizes!

2020 AWARDS PRESENTATIONS

This long-standing tradition is one of the highlights of every Summit. Join us in honoring the best of the best Performance-Based HVAC contractors. You might just be one of them!



NCI PARTNERS TRADESHOW

Our HVAC industry partners help make this conference possible. This year's trade show is open to all at no cost. Talk to product experts, explore new HVAC tools, instruments, products, business services, and much more!



IDEA EXCHANGE LOUNGE

Meet with fellow contractors in this forum where you can join moderated discussions or network with one-on-one conversations.



Seven Fast-Paced Workshops



1. Coach Your Entire Team

What is High-Performance Contracting™ and why are you doing it?



Workshop Leader: David Richardson

Learn how to coach your entire team on your mission and vision as it relates to becoming a different kind of company – one who uses data from performance testing to deliver the best possible products and services to your customers. This coaching should be your first step to get your entire team on the same page.

2. Coach Your Managers

How to implement High-Performance into your business

Workshop Leader: Dave DeRose, Masterworks Mechanical

Once you've got everyone on your team introduced and "on board", it's time to get a little further into the details of implementing the High-Performance approach company-wide. This coaching session is designed to help you coach your management team on some of the subtle, and not-so-subtle changes you will be making to integrate higher performance into your organization.

3. Coach Your Technical Team

How to integrate performance into service and install

Workshop Leader: Casey Contreras

Now it's time to drill down with both your Service and Installation teams on how you plan to integrate High-Performance in their daily work in the field. This workshop covers how you will communicate the training, tools, and support you plan to give them to help them make the transition. High-Performance starts with testing on service and maintenance calls, talking to customers about findings, and recommending next steps. Once a project is sold, your installation team also needs to understand what is expected of them, and what they will be doing differently.

4-6. Special Hands-On Demonstrations

Performance Town 2020: Testing and Diagnostics Labs

Your Instructors: Rob Falke, Jeff Sturgeon, and Justin Bright

NCI's High-Performance Town returns to Summit! In these workshops you'll experience three labs focused on advanced tests and calculations to diagnose and offer highly profitable system upgrades, just as your teams do in the field. **Bonus:** Participants will also receive new detailed NCI procedures and quick reports to integrate into your leadership team's coaching following Summit.



7. Coach Your Sales Team

How to integrate the High-Performance sales approach with your business

Workshop Leader: David Holt, National Comfort Institute

As your technical team gets on the same page, it's important to work with both your inside and outside sales team on the specifics of adding air upgrades and renovations to their equipment replacement proposals, as well as selling stand-alone renovations. It's also important that they understand when they should be able to price the work themselves, and when to bring in higher technical expertise.



Register today at [GoToSummit.com](https://www.gotosummit.com) or call 800.633.7058



Schedule of Events

MONDAY, OCTOBER 5

9:00 am - 10:00 am	Partner Trade Show & Contractor Idea Exchange Lounge Open
10:00 am - 11:00 am	Opening Session with NCI CEO, Dominick Guarino
11:00 am - 12:00 pm	Partner Trade Show & Contractor Idea Exchange Lounge Open
12:00 pm - 1:30 pm	BREAKOUT SESSION 1 – Coaching: What is High-Performance Contracting and Why Do It? - includes 30-minute open discussion
1:30 pm - 2:30 pm	Partner Trade Show & Contractor Idea Exchange Lounge Open
2:30 pm - 4:00 pm	BREAKOUT SESSION 2 - Coaching: Implementing High Performance into Your Business - includes 30-minute open discussion
4:00 pm - 5:00 pm	Partner Trade Show & Contractor Idea Exchange Lounge Open

TUESDAY, OCTOBER 6

9:00 am - 10:00 am	Partner Trade Show & Contractor Idea Exchange Lounge Open
10:00 am - 10:15 am	General Session - NCI Updates
10:15 am - 11:45 am	BREAKOUT SESSION 3 - Coaching: Integrating Performance into Service and Install - includes 30-minute open discussion
11:45 am - 12:45 pm	Partner Trade Show & Contractor Idea Exchange Lounge Open
12:45 pm - 1:40 pm	BREAKOUT 4 - Virtual High-Performance Town 2020: Hands-on testing & diagnostic labs – Part 1
1:50 pm - 2:50 pm	BREAKOUT 5 - Virtual High-Performance Town 2020: Hands-on testing & diagnostic labs – Part 2
3:00 pm - 4:00 pm	Idea Meetings: Lead Generation and Sales
4:00 pm - 5:00 pm	Partner Trade Show & Contractor Idea Exchange Lounge Open

WEDNESDAY, OCTOBER 7

10:00 am - 10:30 am	General Session - NCI Program Updates, Idea Meeting Winners Announced
10:40 am - 11:40 am	BREAKOUT 6 - Virtual High-Performance Town 2020: Hands-on testing & diagnostic labs – Part 3
11:50 am - 1:20 pm	BREAKOUT SESSION 7 - Coaching: How to Market and Sell High Performance - includes 30 minute open discussion
1:30 pm - 2:50 pm	Panel Discussion: Moving Forward in Our New World of Pandemics and Other Challenges
3:00 pm - 3:30 pm	Closing Remarks with NCI President, Rob Falke
3:30 pm - 4:00 pm	NCI Industry Awards Presentation

Register today at [GoToSummit.com](https://www.gotosummit.com) or call 800.633.7058

TECHNICAL

By David Richardson

The PATH to Performance: Part 2

Pressure: The First Step to Airside Performance

Static pressure is the first step on the PATH (Pressure, Airflow, Temperature, and Heat) to performance. It is an airflow foundation and indicator of overall HVAC system health. When used correctly, you can pinpoint hidden airflow restrictions at the filter, coil, and within the duct system.

The PATH to performance can overwhelm you in the beginning. At first glance, there are so many choices it can get confusing on where to start. As we begin this journey, we will address points to help you simplify testing and keep it in context. When done correctly each step moves you forward on the path.

STATIC PRESSURE PRINCIPLES

In its simplest definition, static pressure is the amount of resistance a blower must push and pull against to circulate air through a duct system. It acts equally on all sides of the duct, like the “blow up” pressure that keeps a balloon inflated. Inches of water column (in. w.c.) is the unit of measurement for static pressure.

Static pressure is highest at the air-handling equipment, closest to the blower. Any components in the airside of a system act as resistance (pressure drops) the blower must overcome. Such components include the indoor coil, air filter, and duct system (supply and return). The more restrictive to airflow they are, the higher the static pressure reading.

TEST INSTRUMENTS

Before you can measure static pressures, you need a pressure testing kit that includes:

- Manometer – analog or digital
- Static pressure tips and tubing – neoprene or silicone
- 3/8” test port plugs
- Small drill/impact gun with a step bit or 3/8” drill bit with a sheath/stop
- Scratch awl – for cleaning out internal duct liner/insulation
- Carrying case for all your goodies.

You can typically put together a complete kit for around \$200. Don't skip on purchasing any of these items; they each have a purpose.

TEST PORTS

To access the airside of an HVAC system, you must install test ports at strategic locations in the air handling equipment and duct system. Most systems need four test ports to measure and calculate different static pressures.

You can download the *NCI Static Pressure Test Location Diagrams* for proper test sites on different air-handling equipment. To do so, you will

The PATH to Performance: A Six-Part Series

Over the next several months we will feature articles detailing the keys to the PATH (Pressure, Airflow, Temperature, and Heat). Last month David Richardson provided an overview of the series. You can read that here: [ncilink.com/PATH1](https://www.ncilink.com/PATH1). Future articles will go into more detail on how to overcome the paralysis of trying to implement everything all at once.

Remember, practice makes perfect. So, as Richardson explains, become proficient in each step before proceeding to the next. In the end, you will be able to deliver the greatest value in service and performance that your customers have ever seen. And that will help you deliver the most well-deserved profits to your bottom line.

In the next installment David Richardson will address more details on the second step in the PATH: Airflow. Stay tuned!



need to be a registered user of the National Comfort Institute (NCI) website. The download is here: ncilink.com/SPTestDiag.

DIFFERENT STATIC PRESSURE MEASUREMENTS

The first measurement is **total external static pressure** (TESP). It is what most refer to when they say, “static pressure.” Use it as an initial test to identify potential airflow issues, premature equipment failure, and comfort issues.



To measure TESP, test pressures where air enters and exits the air-handling equipment “as-shipped” from the manufacturer. Then add the two pressure readings together. Gas furnaces, air handlers, and package units vary slightly where you take the two readings. Gas furnaces don’t include the coil in the TESP measurement, but most air handlers and package units do.

TESP tells you that a potential airflow problem exists, but you’ll need more static pressure readings to find the restriction(s). Begin your search with **filter pressure drop** and **coil pressure drop**. These measurements show how restrictive the air filter and evaporator coil are to airflow.

To measure filter pressure drop, test pressures where air enters and exits the air filter. Then, subtract the entering air pressure from the exiting air reading to get the filter pressure drop.

Test coil pressure drop in the same

way, where air enters and exits the coil. Be careful: if you choose a poor location to install a test port, you could hit a refrigerant line and/or a drain pan. A drill bit stop helps assure you don’t make this mistake.

Once you have filter and coil pressure drop readings, check **duct system pressures**. These are single pressure readings taken near the

air-handling equipment, in both the supply and return plenums. They help you find restrictions on either side of the duct system. With these readings, you’re ready to diagnose the results.

DIAGNOSE STATIC PRESSURE READINGS

Static pressure readings don’t reach their full potential unless you have numbers to compare them against. To help diagnose airflow restrictions, NCI developed static pressure budgets based on well-performing HVAC systems across the country and their maximum-rated TESP.

Since TESP is your first test, it is also the first to diagnose. Compare your *measured* TESP to the *maximum-rated* TESP found on the equipment nameplate. If measured TESP exceeds rated TESP, you need to diagnose the system to find out why.

TESP can identify a problem, but you need to look at your other pressure readings to figure out why.

Pressure budgets assign a percentage of the maximum-rated TESP to each component. This gives you baseline pressure readings to compare against your measured pressures to diagnose the most restrictive parts of the system. Download the *NCI Static Pressure Budgets* to use with different air-handling equipment. Again, you need to be registered on the NCI website to do this. Go to ncilink.com/PSIBudgets to download.

DOCUMENT PRESSURE READINGS

Many HVAC pros have no problem taking static pressure measurements and diagnosing them. But it’s at this point that some fail to do anything with that information. You need a

process to capture measurements for future use and lead generation.

The best place to start is with your service technicians. They have the greatest opportunity to measure, turn results into ways to better serve customers, and generate additional work. You need to account for different technician types. Selling technicians and non-selling technicians often handle static pressure readings differently.

The selling tech will take readings, diagnose the system, and then offer solutions to the customer. A non-selling technician will gather the information and hand it off to a salesperson or comfort advisor. It is the comfort advisor who then diagnoses the readings and follows up with the customer.

John Boylan with Lakeside Service,



in Brighton, MI has an ingenious system for tracking static pressure measurements. His techs gather and re-

cord static pressure measurements and then upload them to the company server. They then advise the customer that someone will contact them if the static pressure readings are high.

The Lakeside office prioritizes test results based on how far the results are above maximum-rated TESP. For example, measured TESP that exceeds .90-in. w.c. ranks as an urgent priority on equipment with a .50-in. w.c. maximum-rated TESP. A comfort advisor then follows up with the customer to discuss their system’s health.

The comfort advisors explain results using a blood pressure comparison. High static pressure — like high blood pressure — shows impending issues and why the HVAC system’s health is suffering as a result.



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Then they discuss action steps to consider, similar to a doctor telling a patient about their medical condition. They offer recommendations based on test results and let the customer decide the next steps. Sounds good, right?

OBSTACLES IN THE PATH

Of course, there are obstacles to overcome. With a little planning, it's easier to predict and prepare for these events. The biggest obstacle to tackle for many companies is getting everyone on board. Before you start down the path, first, make sure everyone understands **WHY** you're doing it.

One way is to parallel what you do with static pressure testing to what a physician does. Doctors measure,

track, and help patients maintain good health with their blood pressure readings.

It is easier to get everyone on board when they understand that as HVAC technicians, they are improving a customer's life and heading off future problems.

Fear is another obstacle. The most common fears are:

- Worrying about drilling into a coil
- Taking measurements improperly
- Not knowing how to discuss test results with a customer.

You can overcome these issues with practice, so everyone builds their confidence. Give your technicians and salespeople time to practice and adjust to static pressure measurements in a non-threatening environment.

They must be unafraid of making a mistake or looking bad in front of a customer. You learn as you perform a task, so allow plenty of time for pre-planned practice to avoid fear. **NCI**



David Richardson serves the HVAC industry as a curriculum developer and trainer for National Comfort Institute, Inc. (NCI). NCI specializes in training focused on improving, measuring, and verifying HVAC and Building Performance.

If you're an HVAC contractor or technician interested in learning more about airside performance, contact David at ncilink.com/ContactMe or call him at 800-633-7058. NCI's website www.nationalcomfortinstitute.com is full of free technical articles and downloads to help you improve your professionalism and strengthen your company.



“High-Tech Isolation!”

— Mark Wheeler, MTW Design Services, LLC, Fife, WA

How's this for saving labor and install time for rooftop condensing units? Talk about high tech: this new wooden isolation pallet saves an immense amount of time to set the unit and is a great way to repurpose used materials for LEED certification. Also, structural seismic can be achieved with a nail gun!

Mark Wheeler from MTW Design Services is the winner of our September 2020 Photo-of-the-Month contest, as voted on by the subscribers to **High-Performance HVAC Today** (hvactoday.com) magazine and visitors to the website.

He will receive a \$25 gift card.

You can too – submissions are always welcome. If you'd like to submit a photo for consideration in our Photo-of-the-Month contest, click here ncilink.com/POMSubmit and fill out the information as requested.

THE OCTOBER CONTEST OPENS ON SEPTEMBER 10, 2020.

That gives you plenty of time to submit something in any of our three categories: **The Good, The Bad, and WTH (What the heck).**

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ONLINE CERTIFICATION COMING SOON TO A COMPUTER NEAR YOU!

Exciting News! NCI is now offering two of its most popular certification classes online. Starting this September, you will be able to take our **Duct System Optimization** and **Commercial System Performance** training online from the comfort and safety of your home or office. We will also begin offering online proctored certification exams.

Our new online certification classes take place in four-hour sessions, over four days for a total of 16 hours of education. Each class is led by one of NCI's experienced instructors and is jam-packed with the latest and greatest HVAC education that will set your team apart and ensure satisfied customers.

You will need a laptop or desktop PC to participate. With your registration to these classes, you'll also receive a printed manual and other printed and downloadable materials.

As a member, you'll receive extra savings on the training. Plus you can earn NCI Bucks, or apply Bucks towards the training if you have some saved.

Stay tuned: We plan to bring several other NCI Certification classes online over the next several months.

Click here for more information and to register today! ncilink.com/OLCert.

YOUR SEPTEMBER 2020 POWERPACK IS READY!

It's here and ready for you to access right now – your **September 2020 PowerPack**. We hope you were able to take advantage of all the great tools from the August PowerPack.

This month we provide you with more content to help you with your carbon



monoxide approach and strategy.

Some of the tools included each month may not be normally accessible with your current membership subscription package. However, you can access these tools through this PowerPack portal during the current month.

So, without further ado, let's drill down and take a look at the September 2020 PowerPack:

- **Introduction to Carbon Monoxide** (Online Training Module)
- **Create the Ultimate Fall Marketing Strategy** (Recorded Webinar)

- **NSI 3000 CO Monitor Sales Ideas** (Download)
- **Why Should I Demand a CO Test? brochure** (Download)
- **Important Test Results** (Download). We think you'll find these tools and training materials very helpful as you continue to grow your High-Performance HVAC business.

Be sure to share your September PowerPack with your entire team! So get started today: ncilink.com/PwrPak.

DID YOU KNOW?

Membership in National Comfort Institute (NCI) provides so many benefits that many members often can't keep up with them. For example, did you know that if you are an NCI member with a current certification, your company is automatically included in the **Find-A-Certified-Professional** listings?

Your Find-A-Certified-Professional listing is found on NCI's exclusive consumer site (www.myhomecomfort.org) and includes a premium listing containing your contact information, what certifications your team holds, and a link to your website. It also includes a brief description of the services your company offers as well as what market area you serve.

Is your listing up-to-date? Take a look and find out! Go to ncilink.com/Find-CertContractor and check it out.



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Go to ncilink.com/ContactMe with your comments and questions.

Summit 2020: Coming to a Screen Near You!



Dominick Guarino is publisher of High-Performance HVAC Today magazine and CEO of National Comfort Institute, Inc. He can be reached at ncilink.com/ContactMe

NCI's High-Performance HVAC Summit 2020 is right around the corner, and it's completely virtual. On October 5-7, HVAC professionals from all across North America – and beyond – will come together for this great event. Summit is the only conference created just for companies that set themselves apart with High-Performance service and installations.

While the COVID situation won't allow us to meet face-to-face, we have transformed Summit into a customized virtual meeting that will come very close.

In addition, because you can attend Summit from the comfort of your home or office, you won't waste time traveling. You'll also save on hotel and travel expenses while maximizing your time immersed in the Summit experience.

ACTION-PACKED SESSIONS & TRADE SHOW

We carefully planned this year's Summit to provide ample time for learning with four exclusive coaching workshops. Each workshop is designed to help you communicate with your team how you will implement High-Performance in your contracting business. Each 1.5-hour workshop includes brand-new downloadable coaching and communication tools – along with a 30-minute brainstorming session!

But that's just the beginning. This year, *High-Performance Town* is back and it's virtual! Conference-goers will be able to participate in three, 45-minute hands-on workshops with NCI trainers from across the country.

Both our Cleveland and Southern California training centers have been transformed into broadcasting studios featuring hands-on testing and diagnostics sessions focused on helping you solve the biggest comfort, safety, health, and energy efficiency issues facing homes across North America.

Additional Summit 2020 features include General Sessions complete with late-breaking reveals of brand-new NCI programs, and a panel discussion with High-Performance contractors sharing how they have managed to not just survive, but grow and thrive during a very tough 2020.

NCI's 17th Annual Summit will again include long-standing traditions like our *2020 Contractor Awards*. We're also bringing back our *Sales and Marketing Idea Meeting* where you can share and hear great ideas. And top ideas win cash prizes!

The conference is complemented with a fully interactive *Virtual Trade Show* featuring NCI's Member Rewards partners along with several tool, instrument, and specialty product vendors.

Summit's Virtual Trade Show booths will be open on October 6th and 7th from 9 am to 5 pm Eastern time.

Throughout Summit you'll also be able to meet with your peers in our *Virtual Lounge* where you can share ideas, catch up with old friends, and make new friends.

LEARN TO SET YOUR BUSINESS APART

We know you are faced with a number of choices this fall with several online conferences and virtual events. But if you take a closer look you'll see Summit is different than other industry events.

This conference is not just a generic collection of consultants and industry speakers providing the same old advice on how to improve sales or marketing, or better manage your business.

While those things are important, only Summit addresses the questions: "*How do I set my company apart in the eyes of my customers?*" and "*How do I communicate and implement a High-Performance approach in my company?*"

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We promise to provide the highest quality content, peer-to-peer interactions, and fully interactive sessions to make Virtual Summit 2020 not just the first of its kind, but one of the best Summit experiences in NCI's 17-year conference history.

So don't delay. Register for NCI's High-Performance Summit at a very special price - guaranteed to fit any budget. Visit GoToSummit.com today to enroll your team for what will be the most valuable event of 2020.

NCI is Now Online LIVE!

National Comfort Institute's Distance Learning Program includes both self-directed and live, online classes that range from our foundational HVAC classes like "Airflow Testing and Diagnostics," to recertification classes, Performance-Based Selling, and more.

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