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CLOUD-BASED Service



ALSO IN THIS ISSUE:

How Cloud-Based ComfortMaxx™ Helps Customers Understand System Health

Service Management Systems and the Cloud: Be Sure to Do Your Due Diligence

Social Media Marketing is About Relationship Building

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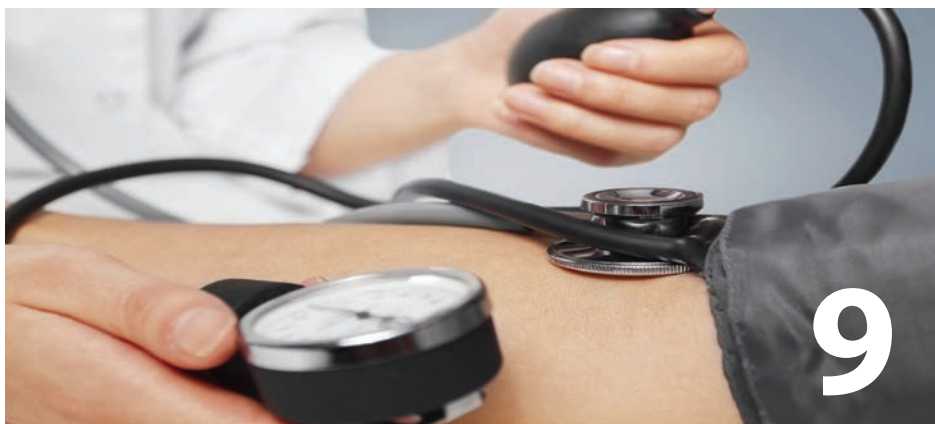
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SERVICE MANAGEMENT:

How ComfortMaxx™ Helps Customers Understand HVAC System Health

Testing, measuring, and scoring HVAC system performance using cloud-based technology shows customers what is happening in their homes.

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SERVICE MANAGEMENT:

Service Management Systems: Be Sure to Do Your Due Diligence

Is it time to upgrade your company's service management system? Should you consider cloud technology? Here are some tips on what to look for.



MARKETING:

Marketing System Performance is about Building Relationships

Contractor Daniel Squires shares his experience using social media to market his High-Performance HVAC Contracting™ company.

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Is Your Company Soaring on the Wings of the Internet Cloud?



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

If there is one lesson learned from 2020, it was the importance of having solid Internet connections and cloud computing ability. Cloud Computing? This is the short name for web-enabled computing services and it has taken flight.

Cloud technology certainly existed prior to the COVID-19 Pandemic — but it became front and center for everything from managing our children's educations to ordering food, and collecting technical data on consumer HVAC systems.

For those of us in the HVAC Industry, this isn't something we talk about every day. But it is a key part of our lives, both personally and professionally. You see, our world turns based on data, its retrieval, storage, and use.

CONSUMER VS. PROFESSIONAL CLOUD

The consumer cloud universe includes services like DropBox™, iCloud™, Google Cloud™, OneDrive™, and others. These virtual hard drives are accessible anywhere, any time, and from any place.

HVAC contractors can also access their management data in a similar way. Depending on what platform you use to manage your company, you and your field operatives have access to customer history, equipment lists, and service history. You can also retrieve lead tracking, system testing, and measurement data, and so much more — all from any computing device.

Cloud-based systems help you streamline workflows, both in the office and the field. Some say they can even help enforce best practices, which is important in the world of High-Performance HVAC Contracting™.

CLOUD CONSIDERATIONS

Cloud computing also provides speed, agility, and cost savings — but to realize its full value, especially in the HVAC trades, requires solving

some challenges such as data gravity (ncilink.com/DataGravity), security, compliance with regulations, cost management, and the need for organizational change.

For example, if you are moving from an older business management system to a newer cloud-based approach, you must think about protecting your legacy data and transferring it smoothly to the new system. That means you need a plan, and you may need some outside help.

THE HELP YOU MAY NEED

Cloud-based systems provided by vendors like FieldEdge and others offer that help. They can provide the ability to order, setup, and implement business and service management systems in less time and with fewer headaches than in the past.


IN THIS ISSUE

With that in mind, in this issue, we focus on cloud technologies that can benefit your business.

For example, take a look at David Richardson's article on the ComfortMaxx™ data collections system for High-Performance contracting companies (ncilink.com/CM-DR).

Also, read our story from FieldEdge on how to find and implement a service management system that uses cloud tech (ncilink.com/Fieldedge).

And though not directly related to the cloud, Daniel Squires of Vincent's Heating and Plumbing shows how he successfully uses social media to market his high-performance contracting services (ncilink.com/SM-VHP).

Does your company soar on the wings of the cloud? If not, maybe it's time to think about how taking advantage of the cloud can benefit your company and further your success as you travel along the path to High-Performance HVAC Contracting. 

ComfortMaxx™ Brings the Invisible to Light!

Do you want to streamline your testing and diagnostic processes? What about simultaneously generating more sales leads and more sales closings? Then you should consider using National Comfort Institute's (NCI) **ComfortMaxx™** cloud-based software.

Here at Canco ClimateCare, we jumped onto the ComfortMaxx software five or six years ago. I immediately saw the value in it. Simply stated, ComfortMaxx is an easy way to show customers what they can't see.

The software provides a cloud-based space to record our system testing measurements. It also does all the calculations and creates a consumer-friendly

report that shows customers what is really happening with their HVAC system -- including their ductwork.

ComfortMaxx enables us to do a comparison of their system before we work on it and after we are done. The numbers don't lie.

We use ComfortMaxx as a diagnostics and verification tool as well as for lead generation and sales.

In a way, this software is also a customer retention tool. Once a client goes through our process, then sees the report, they trust we know what we are doing. They almost always come back to us for more projects.

I strongly recommend that High-Performance Contractors give it a try. You need to be trained and certified by NCI, but after that, it is an inexpensive way to



set your competition back on its heels.

I've even used it to help industry friends solve problems. I always tell them to consider using it themselves, to get the training, and I also tell them to call me if they have any questions. I absolutely love this software and consider it one of the best benefits of NCI membership.

To learn more about ComfortMaxx go to ncilink.com/CMaxx.

-- Will Horner, Canco ClimateCare, Newmarket, Ontario, Canada.



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Past Spotlights: Then and Now

Changes and Challenges Overcome

Each month, National Comfort Institute (NCI) shines a spotlight on contractor members who lead the way in implementing High-Performance HVAC Contracting™. This tradition began in 2011, and the stories appeared in NCI's monthly member email newsletter.

Over the years, these stories of perseverance, culture-changing challenges, and continuous improvements that go well beyond HVAC Industry standards brought to light the success (and yes, failures) of more than 60 companies.

Since those early days, the stories migrated from the newsletter to the pages of **High-Performance HVAC Today** magazine.

This month, we reached out to some of our past “spotlight contractors” to see where they are today. Because space is limited here, we can only tell the stories of three such contracting firms. In the future, we plan to revisit others who've made the choice and investment to join the Path of High Performance.

PIPPIN BROTHERS

In 2015, Pippin Brothers, Inc. of Lawton, OK was “spotlighted” in NCI's Peak Performance email newsletter. Mark Pippin explained in that story that he'd been “blazing the trail” to performance-based service since attending a talk by Dominick Guarino, in 2000.

Long story short, that initial meeting

led Pippin to join NCI sometime afterward. He was one of the earliest members of NCI. At the time of the 2015 profile, his focus was on getting his team trained in the testing, measuring, and selling of HVAC system renovations.

Back then, Pippin told us that NCI's performance-based contracting program changed the way his company did business, and over the subsequent years, they've continued to learn, evolve, and hone their skills.

Fast forward to 2020, and the world is on standby as the most significant healthcare crisis since 1917 sweeps the country. Not surprisingly, the pandemic touched Pippin Brothers.

“Though COVID did impact our business overall, it was not the main reason my air conditioning division suffered in 2020,” he explains. “Over the years, we struggled with our technicians about doing performance testing on every system they encountered in the field. Some of them downright refused to do it. So in the Spring of 2020, I decided to push the restart button.

“I started over from scratch. I reduced the size of the air conditioning division from two salespeople and four installation crews to just one sales person and two install crews. So my air conditioning business shrunk a

little since 2015.”

Pippin adds that today, his smaller field technical team consists of younger people who have great dispositions and are hungry to learn.

“We put them all through NCI performance training. And we did a lot of our own training too. I did all of this because I know it's the right thing to do. Even though I make high demands on my tech teams to measure and test on every call, I don't put a time limit on each job. For me, it's not about the number of jobs. It's about quality. It's about doing what's right for customers. Sure, I don't want techs tied up all day on just one job. I want them to do the work right the first time, and that is what High-Performance Contracting is all about.”

By the way, Pippin adds that the plumbing division never lost a beat last year and continues growing to this day.

ALL PRO PLUMBING, HEATING, AND AIR CONDITIONING

In January 2017, All Pro Plumbing, Heating, and Air Conditioning of Ontario, California, was the Contractor Spotlight in NCI's member newsletter. The story focused on how their HVAC division refocused its mission on a high-performance approach because,



Mark Pippin



Mike Greany

as Service Manager Mike Greany said back then, ‘service performance is the future of the HVAC Industry.’”

Back then, All Pro had 60 employees and achieved gross revenues of around \$10 million. The HVAC division was responsible for nearly 2.5 million of that revenue. At the time, the company was a relatively new NCI member, but that membership, according to Greany had already paid off in many ways. He said that not only did the High-Performance training his team received put them light years ahead of their competition, but he also said that networking with other members of the organization was priceless.

Today, Greany says the company is “so much farther along than we were in 2017. We did take a short step backward in March 2020 with COVID, falling off the Performance Path and resorting to selling boxes.

“However, we did get back onto plan and increased our air upgrade business on the service side. Now we are shooting for generating revenues of \$20,000 per month in air upgrades for 2021,” he says.

Since 2017, Greany says the most significant obstacle they still face continues to be the culture of change, especially in their sales division.

Last year, the company changed from fielding “selling technicians” to using comfort consultants, which he says led from a mindset of *this is how we’ve always done it* to a more consultative approach.

He says, “We made the most progress by including our office staff, management team, and all our techs in NCI training courses. We will make far better progress by discussing and talking about performance in all con-



The Roman God Janus looks simultaneously backward and forward in time. We do the same with this Spotlight retrospective that takes a then-and-now look at contractors who’ve adapted High-Performance HVAC Contracting into their companies.

versations in the shop.

“We collect data on every system we touch and really began using the **AirMaxx™** lite app. As an industry, we need to find better ways to share this information with consumers to help educate them on what is going on with the comfort systems.”

ENERGY SAVERS

In the March 2017 newsletter, our contractor spotlight was on Energy Savers of Georgia, Inc., Columbus, GA. The profile highlighted how, from the very beginning, this company was founded to be different, to be committed to offering first-class customer care at affordable prices. The company came into being during the height of the American Energy Crisis in 1977 and focused on helping customers save energy. They dove into

converting air conditioning systems from six to 10 SEER (top-of-the-line back then).

From the beginning, Energy Savers focused on residential change-outs – service was the proverbial necessary evil. However, that attitude didn’t last. By putting much of their management energy into training, they created a team of professionals who provided top-notch service and could prove they were delivering what they promised.

This stemmed from their affiliation with NCI. It’s what led the company to refocus culturally so they could deliver high-performance HVAC systems to their customers.

This mission has not changed. According to Company President Bill Bell, their growth and sustainability today are the direct result of their dedication to continual training across the board.

“Over the years,” he says, “our High-Performance approach to HVAC contracting has enabled us to truly benefit by being able to prove the



Bill Bell

quality of our installations.”

He adds this is very helpful when their local utility, Georgia Power, offers consumer incentives because his team can prove to the utilities the level of energy efficiency delivered, which helps consumers get substantial rebates.

The biggest issue they’ve faced over the years is the time it takes to test, measure, and diagnose systems.

“We found that in some cases, it would slow down the process of providing estimates to customers. We also had to warn customers that a whole house test/estimate would keep them several hours, and sometimes they were expecting an estimate in 15 minutes.

“However, once they saw the process unfold, it would typically rein-

force the client’s mind that we are the contractor they want to use,” Bell says.

ADVICE FOR HIGH-PERFORMANCE CONTRACTORS


All three contractors agree that continuous training is paramount to success. Pippin says you need to have a cheerleader – either yourself or someone who understands what performance is all about and how that fits with your goals.

“To be successful, you need to stay on top of it,” he says. “Otherwise, your High-Performance HVAC culture will fade away.”

Bill Bell adds it’s essential to work the process continuously. “Look for opportunities to offer the best solution. Don’t just change the box,” he says.

“Use what you learn, focus on it, and make it the normal approach,” Mike Greany concludes. “Continue to educate yourself, your team, and customers on what it is like to live in a comfortable home — the difference between delivered capacity and normal findings.

“And you must know your costs. This hit me hard initially, but it was an investment I was not willing to give up. Today we brag about the growth and revenue the HVAC division has achieved and push to meet our future goals and expectations.”

We’ve all heard that everything changes except for death and taxes. High-Performance contracting is all about changes and challenges. But according to these contractors, it is more than worth it. 



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How ComfortMaxx™ Helps Customers Understand HVAC System Health

The typical installed HVAC system only operates at 57% of its laboratory-rated capacity. That means there is an epidemic of sick HVAC systems. They have ailments hindering them from operating at their full potential.

The unfortunate part is most homeowners do not know the condition of their HVAC system. They have no idea if it is healthy or sick.

What if there was a simple way for you to help customers visually understand their HVAC system's health?

Fortunately, there is, and if you're an NCI member, you already have access to this tool. Its name is **ComfortMaxx™** (ncilink.com/CMaxx). Let's look at what this cloud-based software does and how it can help you show HVAC system health to your customers.

A FAMILIAR SCENARIO

It's an all-too-familiar scene. You go to your physician because you're sick or getting a routine physical. Their office staff takes baseline measurements and compares them to accepted ranges for your age and build. They do this every single time, regardless of the reason for your visit. Occasionally, they discover additional conditions you were unaware of from their test results.

Good physicians have a talent for how they explain these results to you. They often use di-

agrams and models to explain technical information. Have you ever seen a three-dimensional model of a human heart or lung sitting on the exam room countertop? Physicians use these as tools to translate complicated topics and show us what they mean.

During a typical physician's visit, you either have pain and suspect why it's happening, or you have pain but have no idea why. Now you need to figure out what is going on. Depending on the scenario, you want answers and solutions. Cost often becomes secondary at this point. You are sick, and you want a cure.

Your doctor uses a step-by-step process to involve you in the cure. They don't sell you anything. They report their findings and offer



options on how to correct your problem. Sometimes the cure is easy. Other times, more tests are necessary and hard work is needed to treat the problem.

HVAC SYSTEM VITAL SIGNS AND REPORTING

You can follow a similar approach to HVAC system testing, diagnostics, and repairs. However, you need the right test results and tools. Consider this; in the High-Performance HVAC Industry, we follow the same measurement principles as physicians. Unfortunately, we don't consider ourselves on the same level.

If you think about it, High-Performance HVAC contractors are **thermal therapists**. We find the source of comfort problems and prescribe solutions from test results. The routine physical is a maintenance call. Emergency service calls are like when you're sick. You know something is wrong and you need a cure.

The measurements you use to reveal those hidden conditions affecting customers' HVAC system's health are static pressure, airflow, and temperature. These are HVAC system vital signs. They serve the same role as blood pressure, weight, and temperature for a physician.

LOST IN TRANSLATION

Your measurements alone are confusing and don't tie to anything your customers understand. We of-

ten forget this because we use the language each day. Consider how you would respond if your physician talked with you using the following statements.



“Your elevated systolic and diastolic pressure readings show you’re at stage three hypertension. There is also the possibility of atherosclerosis. Your BMI (Body Mass Index) of 30 is also a major contributor to your condition. What would you like to do?”

What non-medical person would understand what that means? How can you make an educated decision from all the technical jargon?

Why couldn't the physician tell you your problems are high blood pressure, hardening of the arteries, and

needing to lose some weight? Then they could show you medical references that back up what they told you. Seems like common sense, right?

Unfortunately, in the HVAC Industry, we do this to our poor unsuspecting customers. They have no clue what we're saying. Then we ask them if they understood what we said, and they answer yes because they don't want to look foolish.

The customer will fall back on the one thing they understand when deciding: Price. They decide based on the lowest price, and we wonder why. If your customers don't know what you're saying about their system, they can't make an educated decision.

HOW COMFORTMAXX TIES IN

ComfortMaxx is an HVAC System translation tool. It interprets the three HVAC system vital signs you consistently

gather on maintenance or service calls. It's the missing link for translating technical measurements to simplified visuals. Think of ComfortMaxx as the three-dimensional heart model your physician uses to show you its inner workings.

You gather the measurements, and the software creates a translation report for the customer.

Once the report is published on a tablet or printed, your customer can look at it and tell you what is wrong with their system. It's that simple. They may also tell you what they would like done. Isn't that a unique approach?

You gain third-party credibility be-

cause the software creates the system health report in an easy-to-understand format.

Your customer gains an understanding of their system that exceeds your competition. They now know how to make an informed decision because they understand what your measurements mean.

There are three levels of reporting from which to choose. If you only want to look at static pressure and airflow vital signs, a **ComfortMaxx Air™** (ncilink.com/CMAir) report is perfect.

However, if you want to add temperature, you'll need to use a **ComfortMaxx Pulse™** (ncilink.com/CMPPulse) report. It depends on the level of testing you want to provide.

You can also provide customers with

data-based assurance that the changes and upgrades made to their system deliver what you promised.

You can do this using **ComfortMaxx Verify™** (ncilink.com/CMVerify). It adds airflow and temperatures from the supply registers and return grilles to create a total system performance score.

HOW COMFORTMAXX WORKS

If you're new to ComfortMaxx, it is a cloud-based software. You'll need a tablet or laptop and an internet connection to use it.

The testing process in ComfortMaxx follows a four-step approach to help you keep your customers' information organized and easy to find in a secure cloud location. These four steps are:

1. Customer

2. Location

3. System

4. Test.

Your inputs begin with your customer. ComfortMaxx organizes customer accounts as you do in other areas of your business. This includes details such as the customer's name, address, and contact information.

Once you create a customer, you create a location (or multiple locations) for them. You probably have customers with multiple properties such as their home, office rental property, or vacation home. To accommodate this type of organization, ComfortMaxx matches locations up with the customer instead of separately.

By the way, the office can gather most of this information and input it

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into ComfortMaxx when they set up the appointment.

That way, your field techs only have to look for the customer and address in the ComfortMaxx app and proceed directly to the next step.

That step is inputting the system(s) installed at that location. This includes items like the system's name, installation location, area it serves, and equipment details. Once that information is input, all that's left is for you to test.

You only enter the first three steps — customer, location, and system — once.

When you perform a test on a system, you choose the test type to perform and begin taking the measurements to record into the software. Once done, ComfortMaxx generates a report you can use to help customers

understand their HVAC system's overall health.

HOW COMFORTMAXX TRANSLATES TECHNICAL DATA

For ComfortMaxx to generate a report, you must gather and input the correct data, or the software can't translate correctly. Incorrect information equals confusing or inaccurate translations.

Once you enter your static pressure, airflow, and temperature measurements, ComfortMaxx compares these measurements to manufacturer specifications and NCI static pressure budgets. Your customer can see how their system ranks compared to where it should perform.

The areas that need the most work

show up in "danger" areas on the report as colored graphs and charts.

Now the fun begins. Hand your customer the ComfortMaxx report (print or digital) and ask if they see anything that looks concerning. Let your customer identify the problems while you remain silent.

This is where the magic happens. They will see the red on the graphs and charts and tell you, "It looks like I have a problem here." That's your cue to ask them, "What should we do?" and let them do the rest. They will connect the dots on why a particular room is uncomfortable or they've had ongoing equipment problems.

Remember, your customers need information that relates to something they already understand to make a

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connection. ComfortMaxx makes that connection. Without the connection, you are stuck trying to convince on price alone. Results are easy to understand and make 'pain' visible, reliable, and memorable.

NEXT STEPS

You might wonder what you should do next? Here are a few questions to consider as you get started.

- What do I need to have in place before I use ComfortMaxx?
- Who will use ComfortMaxx and how will we apply it?
- Do we know how to take all the measurements?
- Do we have and understand the test instruments necessary to measure static pressure and temperature?

- Do we have the right technology to use ComfortMaxx?

- Can we explain the test results, as a physician would?

If you discover there are missing pieces, consider reading the *PATH to Performance* (ncilink.com/PATH1) series in **High-Performance HVAC Today**.

This series offers a pattern to follow. Then use the ComfortMaxx software as your reporting and translation tool. It can provide a map to follow for diagnostics and resulting repairs needed to cure problems.

Sometimes we aren't aware we have health issues and need help. Often, HVAC systems are the same way. Since the average HVAC system only operates at 57% of its laborato-

ry-rated capacity, there are many sick HVAC systems.

They need your help to cure them so they can operate like they're supposed to. Use ComfortMaxx as the tool to assist you as a thermal therapist. **NCI**



David Richardson serves the HVAC industry as a curriculum developer and trainer at National Comfort Institute, Inc. (NCI). If you're an HVAC contractor or technician interested in learning more about ComfortMaxx cloud-

based software, 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.

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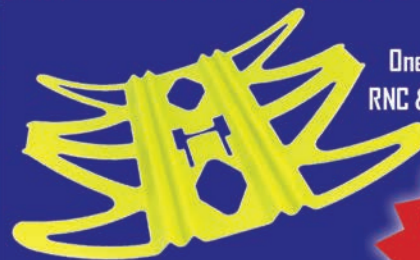
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Service Management Systems: *Be Sure to Do Your Due Diligence*

It's no secret that having a good Field Service Management (FSM) system is key to keeping your business organized and increasing your business's growth potential. You want your FSM solution to make it easier to manage your daily operations, especially when things get busy.

If you're not currently using FSM software or if your current setup isn't cutting it, now is the time to consider upgrading to something more efficient. The key is to do your research or due-diligence beforehand and understand the considerations you need to take. It's going to be a significant change but think of it as a change for the better.

WHY DO I NEED A FIELD SERVICE MANAGEMENT SOLUTION?

Among the many benefits of a solid FSM system is that you'll start to notice improvements across the board.

You'll see your business become leaner and

more organized – taking on more jobs, automating service agreements, managing employees better, decreasing the likelihood of human error, and increasing profitability.

ON-PREMISES VS. CLOUD-BASED

These days, you'll see a lot of talk about on-premises vs. cloud-based solutions. On-premises FSM systems were more common in the past. Today we see many more cloud providers.

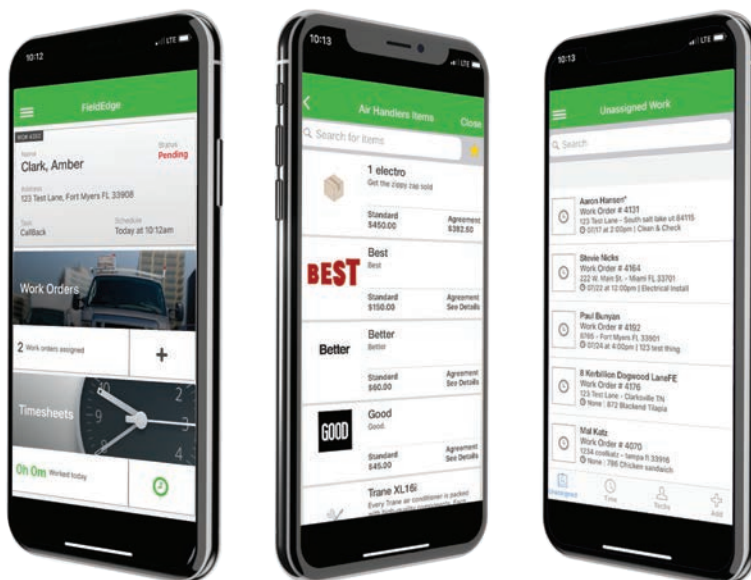
More FSM solutions are moving to cloud-based services because of increased convenience and security for users. Going to the cloud enables you to use any computer or mobile device to access the software. Cloud computing offers many perks for you to consider, including:

- No installation or maintenance costs
- Automatic updates pushed by the software provider to you
- Access to various app integrations
- Accessible anywhere at any time, even in offline mode
- Encrypted data to protect against hackers
- Information Technology support team.

This type of support group can access your system and help with any issues you may encounter.

When you do things using pen and paper or with an on-premises solution, you can lose valuable information if paperwork is accidentally thrown away or your computer crashes. Cloud technology protects against both disasters.

Cloud-based service management systems provide field technicians access to data on any device: mobile, laptop, or computers back in the office. **To the left:** mobile app interface.



GOING MOBILE WITH FSM

The great thing about most FSM solutions is that they provide mobile apps your technicians can use when they are on the go. Apps provide the perfect way to ensure that employees in the office and the field are constantly communicating with one another.

Think of the mobile app as a condensed version of the software with features and functionality technicians need to complete jobs. With the mobile app, technicians should create work orders and invoices, provide good-better-best options, view customer and/or work order histories, track their time, provide job status updates, and collect payments.

TRANSFERRING LEGACY DATA

When you decide to upgrade your FSM system, the biggest issue to keep top of mind is data migration, especially if you're moving from one solution to another. To prepare for the migration process, make sure you clean up your data and create a full backup, just in case.

Software providers usually have an in-house data team that helps you

High-Performance measurement data can be stored in the cloud for quick access for analysis, lead generation, and more.

manage the entire migration process.

Your data consultant should work with you to get everything ready and in a good place before the migration process begins. These experts should ensure that all of your information is set up to be migrated securely and successfully.

BE PATIENT AND ASK QUESTIONS!

When you first begin using the new FSM system, it may be a little overwhelming, and that is normal. Be sure to ask any questions you have.

This process is called onboarding, and most vendors have support teams to help you out.

Onboarding is the perfect time to ask questions and learn how to make



the best use of this new tool.

Some software providers even provide training programs that you can take advantage of for you and your employees.

In the end, if you do your due diligence upfront and take advantage of the training your vendor offers, you will end up in a far better position than where you started.

It's going to be a continuous learning process. Still, you want to come out on the other side feeling ready to start using your new, upgraded software, improving your team's productivity, and ultimately, driving more dollars to your bottom line. **NCI**



Cloud-based applications, such as ComfortMaxx™, help techs to be more productive, plus gathers data and stores it where technicians as well as office personnel can access it any time, anywhere.



Metz Bizzell is the Strategic Partnerships Manager at FieldEdge, a field-service management software provider in the mechanical contractor space. FieldEdge has 40+ years of experience in HVAC and provides software solutions that

allow contractors to go paperless, streamline operations, and increase profitability.

To learn more about FieldEdge, visit NCI's Partner page at ncilink.com/partners and take advantage of our TIPP partnership. Or visit their website at www.fieldedge.com.

Marketing Performance is About Relationship Building

At Vincent's Heating & Plumbing (VHP), it's no secret that one of our advantages to navigating the digital marketing gauntlet is using a third-party vendor whose expertise is just what we need. In our case, it happens to be our sister company, Online Access.

Anytime you work with a third-party partner, you have a ready-made "network," if you will, of other users who provide their experiences on what expectations and goals to set for your online social presence.

I'd love to say that we hand it over to Online Access to do all the work. However, even with constant content creation and posting, it doesn't mean anything to our local audience without a personal touch.

At VHP, we pride ourselves on being very involved with several local organizations, charities, and sports programs.

We see the most significant interaction and success on our Facebook page, for example, when we involve these other local groups and businesses in contests, or even other cross-promotion efforts, for their causes and events.

IT'S NOT ALL ABOUT WHAT YOU SELL

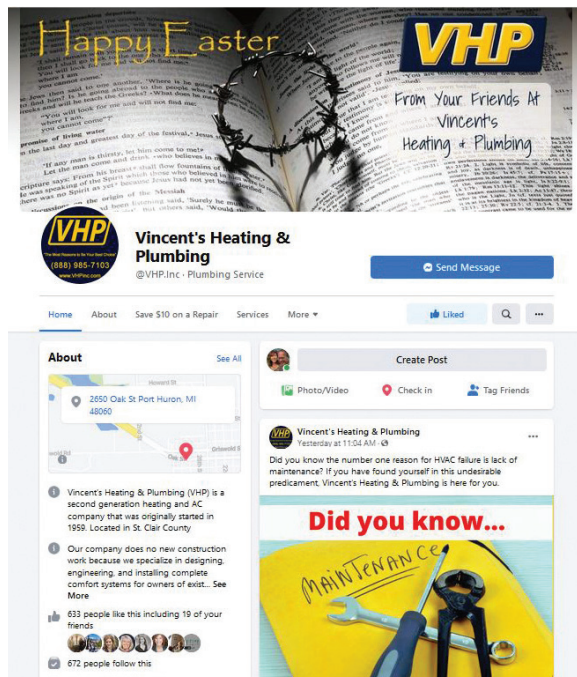
Long ago, we learned that nobody cares about what we sell until they have an emergency. It wasn't easy to keep people following our company's Facebook page when all we posted was equipment information and sales promotions.

Some people may see success with these posts. However, in our experience, special offers boosted on Facebook only brought us low-quality leads who were unable to afford our services or qualify for financing. We found far more success in building quality relationships and mailing lists through local charity contests and community projects.

By working with local organizations, we changed everything. For example, we created engaging social media over the holidays by participating in our city's Christmas Lights project in a local park. Businesses were asked to adopt a city park section, deck it out in lights, and create a massive community walk-through display.

We spent some money on lights and worked with our third-party social media vendor to promote the entire event. We posted pictures of our team putting it together. Our part of the light show included a sign in front of the light display that read, "*Merry Christmas - May the Season Bring You Joy and VHP Bring You Comfort.*"

The park itself saw thousands of visitors over the holiday. Our spot was so well decorated that crowds of people used it as a family photo and video backdrop. They posted those pictures and videos on their social feeds.



VHP Facebook page focuses on the community, which helps build relationships and leads to future business.

SOCIAL MEDIA SHOULD REFERENCE YOUR EXPERTISE

No matter what you are promoting through social media channels, it's always a great idea to include something about what makes you the expert in your field. For VHP, a lot of our expertise lies in our High-Performance approach to HVAC contracting. Because we measure, test, and diagnose systems in ways like how physicians measure, test, and diagnose people, we feel it's always beneficial to mention something about that in our posts.

Do we do this all the time? No. But you should find ways to promote the skills, training, and certification you and your team hold that sets your company apart from competitors.

Your community presence and regular reminders of your HVAC expertise will get people's attention and help to build a solid reputation in your marketplace.

COMPANY SOCIAL MEDIA POLICY

In 2020, like many other contractors, we learned the importance of having a company policy for social media. Last year saw the most divisive political climate and social media turmoil regarding both the election and the pandemic than we ever encountered before.

As a business, our page remained politically neutral. In our opinion, it's not smart business to alienate half of your customer base.

To accomplish this, we created company policies regarding online reviews, employee personal posts, and community discussion groups. We encouraged our technicians not to tag VHP as their place of employment in their profile.

Learning from other contractors' unfortunate experiences with this issue led us to be proactive with our staff because addressing a problem after a post has gone viral is far more difficult.

SOCIAL MEDIA AD CAMPAIGNS

When it comes to ad campaigns and boosting on Facebook, we maintain a pretty conservative budget, generally nothing over \$200 - \$500 per month, depending on the season and promotion. In our experience, paid promotions work better on posts that have already received organic engagement.

This is akin to kindling a flame. Organic posts, once boosted, generally reach farther and don't cost as much.

Most of our expectations and goals with our paid ad or boosted content revolve around building our page audience and followers.

When we set up paid social media announcements for equipment sales, hiring, or financing, we make sure to pair it with a landing page on our site containing a quick form to better track leads, especially if it's a hiring post.

Remember, if you don't measure, you're just guessing. Measuring how your social media posts work is key to understanding how well your messaging works so you can continue to create meaningful campaigns.

JOB POSTINGS

Job posting on Facebook has come a long way. If we post a job, we often take two different approaches. The first is to create our hiring ad graphic and post it, usually to our wall. This post contains a link to a landing page on our website with a complete job description and application form.

The second approach uses that same

graphic, but posts it with Facebook's specific job posting function. The Facebook ad function allows you to build a short custom application form and job description.


Facebook then shares this specifically with job boards and targeted people who are job hunting. It's treated differently than a standard post.

We still prefer sending people to our website's landing page as part of the process because it's a much more thorough application.

YOUR INVOLVEMENT

As a reminder, when hiring or creating any ad content, contractors should focus on using content and images that "sell the destination, not the plane." As the owner of a High-Performance HVAC contracting business, I have also learned that my investment in sharing our company's content is paramount.

In our experience, if you view the goal of social media as staying connected with and relevant to your customers when they don't need service, yours will be the name they'll remember and call when they do.

For the team at VHP, this is one of our tools for building and maintaining solid relationships. 

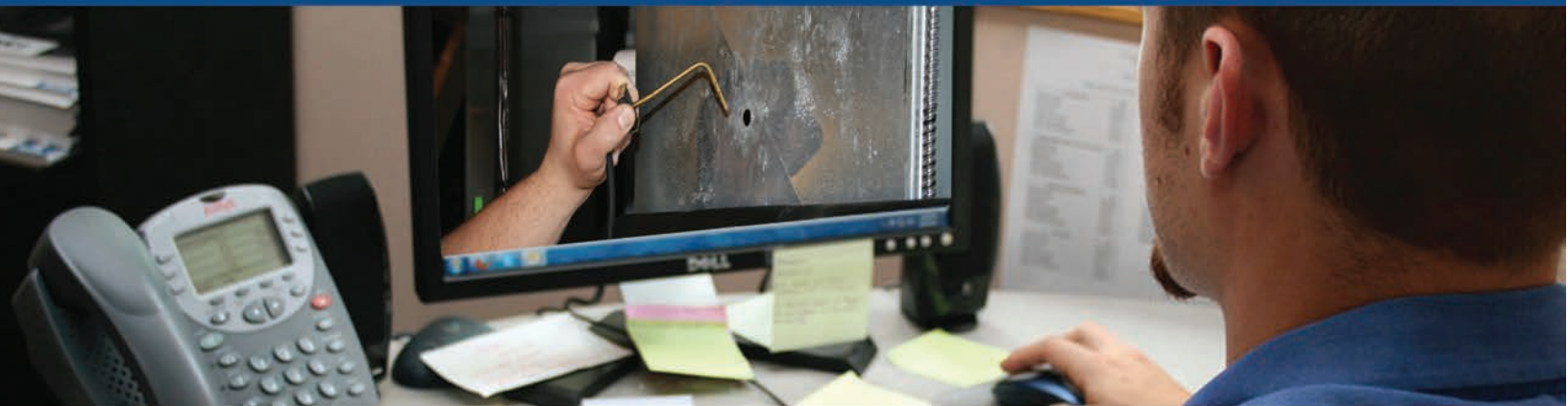
Daniel Squires is a licensed Michigan Master



Plumber, but considers himself an entrepreneur and marketer. **Vincent's Heating and Plumbing**, is a family owned business that he and his brother David transformed from a mom-and-pop business to a dominant residential heating, cooling, and plumbing company in

Port Huron, MI. They did this through innovative marketing and business practices. Contact him at ncilink.com/ContactMe.

California Utility Hosted Online Live Training for HVAC Professionals



National Comfort Institute, Inc., (NCI) High-Performance HVAC training is now available to HVAC professionals throughout California. Southern California Edison and Pacific Gas and Electric have partnered with NCI to provide advanced training and certification.

These NCI classes also qualify for NATE and BPI Continuing Education Credits.

NCI offers cutting-edge HVAC training programs from technical, business, sales, and marketing perspectives. Learn from our knowledge experts how to solve airflow and comfort issues others miss every time, lead your team to success, improve your sales approach, and develop Key Performance Indicators (KPIs) that keep you and your staff accountable.

Our online, live classes are provided in 4-hour blocks. For example, our Residential Duct System Optimization program consists of four, 4-hour segments of training over a two week period. Students who participate in certification classes will also qualify for online, proctored NCI certification exams after the training, sponsored by our partners.

National Comfort Institute thanks the following Investor-Owned Utilities for hosting this training for HVAC professionals throughout California:



Upcoming California Training Calendar

 SOUTHERN CALIFORNIA EDISON	Commercial System Performance May 18-19, May 25-26 8am - 12pm Pacific <div>Certification Exam Included!</div>	16-hour training program Regular Price: \$690 Student fee: Just \$100 per student Registration Closes: May 11 2021
 Pacific Gas and Electric Company	Improve Economizer Performance May 18-19, May 25-26 4pm - 8pm Pacific <div>Certification Exam Included!</div>	Four 4-hour sessions over four days Regular Price: \$690 Student fee: Just \$100 per student Registration Closes: May 11, 2021
 SOUTHERN CALIFORNIA EDISON	Performance-Based Selling May 25-26, June 2-3 8am - 12pm Pacific <div>Certification Exam Included!</div>	16-hour training program Regular Price: \$795 Student fee: Just \$100 per student
 SOUTHERN CALIFORNIA EDISON	Improve Economizer Performance June 8-9, June 15-16 8am - 12pm Pacific <div>Certification Exam Included!</div>	Four 4-hour sessions over four days Regular Price: \$690 Student fee: Just \$100 per student Registration Closes: June 1, 2021
 Pacific Gas and Electric Company	Commercial Air-side Online Recertification* June 10-11 8am - 12pm Pacific	8 hours - two 4-hour sessions Regular Price: \$395 Student fee: Just \$50 per student

* You must be NCI certified to be able to attend NCI Online recertification classes

Take an NCI Course Today! Call 800-633-7058 or visit ncilink.com/CALUtility

This program is funded by California utility customers and administered by SCE and PG&E under the auspices of the California Public Utilities Commission.



High-Performance HVAC Summit 2021: This Time It's Personal!



Mark your calendars for August 30 to September 2, plan to stay through Labor Day, and get ready for one of the best Summits yet.

Summit's unique design this year lets you personalize your experience based on your knowledge and comfort level with each topic! This year we decided to do things a little differently.

We created a breakout session approach where each topic area will have three options:

- **Novice** – Choose this level if you're beginning to learn the specific discipline.
- **Practitioner** – This stage is for attendees who have begun practicing these skills and want to take it up a notch – or need a refresher
- **Mastery** – Choose this option if you're already proficient in the specific area and are ready for the next level.

This new conference design lets you choose sessions based on where you are today on the path to High-Performance Contracting™.

You may need a **Novice** session in some areas, while in others you may be ready for **Practitioner** or even

Mastery level training – you choose!

There will be **18 different breakout workshops from which to choose!** With so many breakouts, we recommend you bring at least three people from your company this year. To make

it easier, we're offering special three-pack bundle discounts!

Breakouts include:

- Session One: **Airflow Diagnostics and Air Upgrade Workshops**
- Session Two: **High-Performance Sales Workshops**
- Session Three: **High-Performance Implementation Workshops**
- Session Four: **High-Performance Software Workshops**
- Session Five: **High-Performance Town Workshops**
- Session Six: **Carbon Monoxide and Combustion Workshops.**

Summit 2021 also packs in special events, including the very popular **Idea Meeting** and **Awards Banquet**.

Plus, you can look forward to NCI's traditional **Welcome Reception and Celebration, Partners Reception, and Tradeshow**. Bonus **Partner Educational Sessions** round the event out.

For all the details on the breakout sessions and speakers, as well as registration, pricing, and exceptional hotel packages, point your browser to: GoToSummit.com

Also watch your email for more details

and registration information.

Energy Star Recognizes NCI and NBC

ENERGY STAR recently recognized National Comfort Institute (NCI) and National Balancing Council (NBC) as **Functional Testing Agents** in support of their *Multi-Family New Construction HVAC Functional Testing Checklist* (ncilink.com/EPA-ES).

What this means is that HVAC contractors who've trained and been certified by NCI/NBC in the following disciplines are qualified in the Energy Star program.




For NCI, contractors qualify for sections 1-6 of the checklist if they are certified in Refrigerant-side Performance AND any of the following air-side certifications:

- ☐ Duct System Optimization Specialist
- ☐ Residential System Performance Specialist
- ☐ Residential Air Balancer
- ☐ Commercial System Performance Specialist
- ☐ Commercial Air Balancer.

NBC-certified contractors qualify for sections 1-9 of the checklist if they've earned Refrigerant-side Performance AND the Large Commercial Balancing certification.

Regardless of Energy Star programs and/or participation, this is recognition of the NCI and NBC Certifications by both the EPA and the U.S. Department of Energy.

These designations came about thanks to the hard work of NCI's Utilities Services division (nciutilityservices.com). 



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10 Great Reasons to Register for Summit 2021 Today!



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NCI's 19th Annual Summit is back better than ever and **in-person** this year! The industry's one and only High-Performance HVAC annual conference will unfold in beautiful Branson, Missouri, from August 30th to September 2nd. And we are rolling out a brand-new approach in response to your input.

Summit's theme this year, **This Time It's Personal**, describes how each attendee can personalize their Summit experience by choosing from three levels — Novice, Practitioner, or Mastery — for each of the conference's six main breakout sessions. Now you can pick and choose just the right level for you in each breakout session!

Regular conference-goers know there is so much more to Summit, and there are dozens of reasons they attend year after year. Here are just 10 great reasons why Summit may just be the best industry meeting you will attend this year:

10. Numerous Special Events and General Sessions, starting with our Monday evening Welcome Reception sponsored by Goodman/Amana. These fun, highly interactive events provide tons of opportunities to learn together as a group, while sharing experiences and knowledge in a casual and entertaining environment.

9. High-Performance Town is back! Each hands-on station is uniquely designed to challenge everyone, from novices to experts. NCI instructors will guide you as you learn effective testing and diagnostic techniques and approaches.

8. Summit's unique, intimate Partner Tradeshow is set up in the general session ballroom to allow maximum interaction between NCI partners and vendors — not just during exhibit hours, but throughout each meal, break, and social event.

7. In two Bonus workshop session blocks, NCI partners will provide education focused on helping your company grow and prosper.

6. Our long-standing traditional High-Performance Idea Meeting is a great place to ex-

plore and share successful ideas that can help you market and sell High-Performance HVAC service and replacement.

5. Pre-conference Events include full-day classes where you can recertify your air-side or CO & Combustion certification, and earn CEUs for NATE, BPI, and state licensing. Be sure to check out Goodman's **Inverter Day** — an all-day training event focused on marketing, selling, and delivering high-end inverter systems.

4. NCI's Reach for the Summit interactive gameshow is a fun and educational session where contestants compete for prizes and bragging rights. Want to be a contestant this year? Once you register for Summit, you'll be able to throw your hat in the ring.


3. NCI's Summit Awards Banquet is a gala event like no other where you can help honor the best-of-the best. Who knows? Maybe you will be on stage this year!

2. Whether you are an owner, manager, salesperson, customer service rep, technician, or installer, we have a choice of 18 Summit Workshops at just the right level to help you supercharge your high-performance success.

1. According to repeat attendees the biggest benefit of Summit is the Camaraderie and Relationships that are forged and deepened each year between High-Performance contractors from across North America.

I could easily share 10 more reasons why Summit will be the best educational investment you can make for you and your team in 2021.

Never been to a Summit? Give NCI a call, and we will connect you with a fellow contractor who will share why they hardly ever miss this one-of-a-kind industry event.

To learn more about Summit and enroll your team today at special **Early-Bird** rates, just point your browser to GoToSummit.com. Can't wait to see you at Summit this year! 

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