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ALSO IN THIS ISSUE:

**What is the Cost of
Non-Conformance?**

**Indoor Humidity Problems
and Solutions: Part 2**

**Diagnostic-Generated
Lead: What's Next?**

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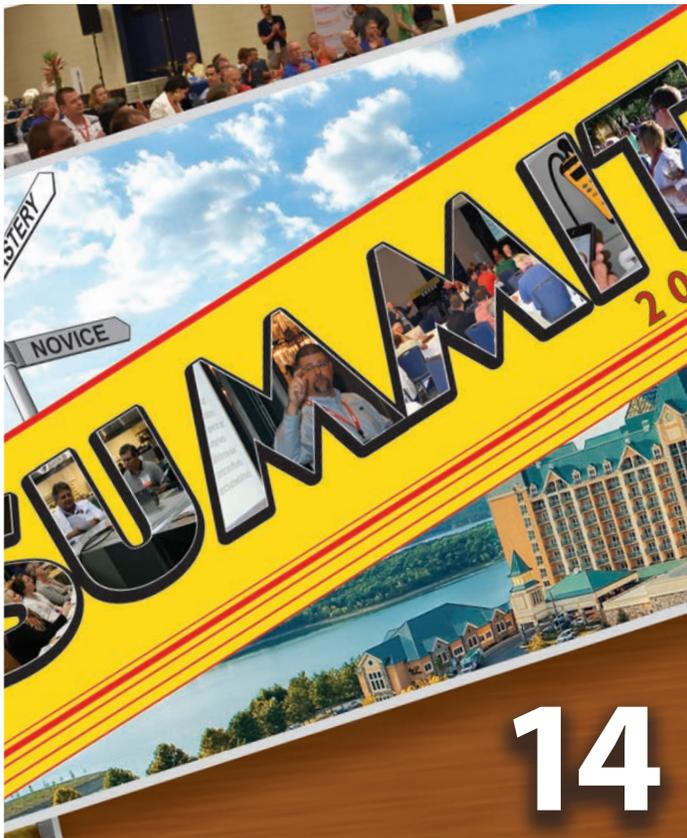


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HIGH-PERFORMANCE HVAC TODAY™



COVER STORY:

Summit 2021 is Personal This Time

Join us in Branson, MO for the first post-pandemic in-person-Summit. It IS personal because you can customize how your team learns. Learn more here.

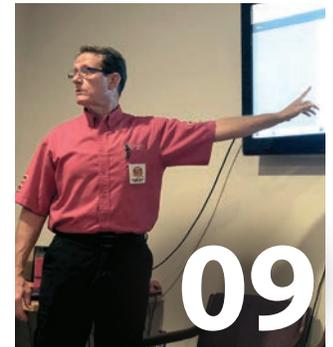
DEPARTMENTS

Today's Word	4
High-Performance HVAC Product Review	5
Contractor Spotlight: Top Tech Mechanical	6
Member Update	27
HVAC Smart Mart.....	28
Ad Index.....	29
One More Thing	30

MANAGEMENT:

The Cost of Non-Conformance

Contractor David Small of Crossway Mechanical explains how non-conformance leads to errors and callbacks.

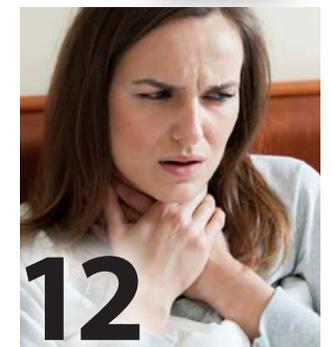


09

TECHNICAL:

Indoor Humidity Problems and Solutions (Part 2)

Ben Lipscomb, P.E. & Dennis Mondul finish their discussion from last month on humidity control, no matter where you live.



12

MARKETING IN 2021:

Where to Start with Your HVAC Digital Marketing

Customer expectations have drastically changed since the pandemic began. Are you now reaching them effectively?



21

SALES:

Diagnostic Sales Lead? Now What?

NCI President Rob Falke explains next steps to closing a High-Performance sale after you've tested and diagnosed an HVAC system defect.



23

High-Performance HVAC Summit: *Why It's Personal this Time*



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

In my 41 years as a journalist (37 of those years in the HVAC Industry), I've met a lot of people, traveled to many places, and learned much from all the different channel partners with whom I've had the privilege to work.

Those years included a lot of in-person meetings, phone conversations, correspondence, and in more recent years, digital meetings (Zoom, Facetime, Goto Meetings, others). In all that time, I find I get the most from face-to-face discussions, whether over a conference table, at a trade show, in a hallway between seminars, or over dinner/lunch/breakfast together. This personal approach has served me well, and I am sure everyone reading this has had similar experiences.

Unfortunately, the COVID pandemic changed all of that.

ISOLATION SUCKS

In 2020, isolation led to business interruption, especially in the service sector (restaurants, some small retail businesses, and others). In the HVAC Industry, isolation made many customers fearful of having technicians inside their homes.

The good news is that many HVAC contractors got creative and managed to do well despite the fear factor.

Fear comes from not knowing or understanding what is happening and it impacts consumers, contractors, co-workers, manufacturers, and distributors alike. In their quest to stay in business, many contractors found creative ways to put customers at ease. This benefitted their businesses and consumers alike.

YES, VIRGINIA, WE'RE DOING IT LIVE!

With that in mind, National Comfort Institute (NCI) has re-instituted its in-person live event:

the **High-Performance HVAC Summit 2021**. But here is the really cool thing: the program provides you a creative way to personalize what your team learns.

So, what does that mean? We created a breakout session approach where each topic area will have three options. That's a total of 18 personalized learning opportunities. The per-class options include:

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

And we are doing all of this in person!

LET'S GET PERSONAL!

Join us in Branson, MO from August 30th to September 2nd for a chance to reconnect with your peers in the High-Performance HVAC Industry. Summit live is an opportunity for your entire team to re-invigorate. Your colleagues can see the High-Performance HVAC approach up-close and personal. They can interact with some of the smartest, and most successful contractors in the entire HVAC Industry.

This IS personal. Nothing beats the experience of sharing ideas, learning from each other, and being able to focus on bettering ourselves. It's also an opportunity to meet new people and have fun together in a resort environment that should "sunset" the pandemic isolation fears once and for all.

You'll find all the info you need at gotosummit.com. **See you in Branson!** 



Dwyer DP3 Wireless Differential Pressure Module

Red and Black go together like fish and a river. Dwyer Instruments developed a new wireless differential pressure module that is a joy to use.

It is compact, highly accurate, auto-ranging, and ideal for use in low flow applications. The **DP3 Wireless Differential Pressure Module** measures down to 10-thousandths of an inch and can connect to Dwyer's airflow grid for velocity measurements.

I think the DP3 is more for the commercial and air balancing market rather than residential. Not to say a residential guy couldn't use it, but it all depends on what they are trying to accomplish.

The DP3 requires using Dwyer's supplied android device for communications. In fact, the Series DP3 is used with the **Dwyer Mobile Meter**® application software (ncilink.com/MobileMeter) to view pressure drop across filters, static pressure in ducts, and velocity pressures from pitot tubes or airflow stations.

The device accomplishes communication using built-in Bluetooth Low Energy (BLE).

What's really great is that you can add other Dwyer air balancing devices to this communications tool.

Other cool features include an LED indicator and a rechargeable lithium-ion battery, which charges using a mini-USB. The DP3 is small: it practically fits in the palm of your hand and has built-in magnets in case you need to set it aside.

Like other differential pressure modules, the DP3 has dual ports and calculates the pressure differences for any HVAC system pressure drops. It can also measure building pressures.

I didn't throw it off the roof to see how durable it is, but it does seem tough.

There are areas on the DP3 that are rubberized for protection, but I would recommend you still be careful with it. After all, it is a sensitive measuring instrument. With the DP3, I don't think you'll be disappointed.

For more information, visit the **Dwyer Instruments** page at ncilink.com/DwyerDP3.

— by Casey Contreras,
NCI Field Coach, and Trainer

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TOP TECH

MECHANICAL SERVICES

Bringing Performance Online

There are many paths you can take to get to the High-Performance approach to HVAC contracting. For some, it means focusing on education and training and finding ways to get performance working in their companies. For others, the path began at startup and the company, as they would say, was always performance-based.

For **Top Tech Mechanical** (toptechmech.com) in Kennesaw, GA, the path began as a commercial refrigeration and HVAC installation company focused on the new construction market. That is where owner Kevin Newman cut his teeth on business ownership. Top Tech Mechanical was born in 2012, but Kevin Newman started in the trades long before that.

IN THE BEGINNING

In fact, Newman says he began working for his stepfather, Mark Miller, when he was just 14 years old. He swept floors and eventually worked his way into being a helper during summer and on weekends. Newman credits his step father, who passed away in 2019, with mentoring him and getting him ready for a career in contracting.

Later Newman went on to work for a company that specialized in restaurant equipment repair and installation. Newman says this is where he

learned some tough lessons about frustrations and how to work through them. The company didn't seem to have any organization or structure as to how it went about business. And Newman adds that customer service was lacking, making this company not such a great place to work.

"I like to fix things and give customers options regarding what is necessary to repair their full system. I don't like to leave anything in a state of disrepair," he explains.

So, like so many before him, Kevin Newman decided to hang out his shingle, and in 2012 Top Tech Mechanical was born. And like so many before him, Newman discovered the challenges didn't end. They got more complicated.

THE EARLY DAYS OF TOP TECH

In 2012 and 2013, the U.S. economy was in recovery mode from the recession of 2007 through 2009. Though it was growing, the economy was doing so very slowly. The U.S. Federal Reserve began pumping more cash in, dropping interest rates, and raising the debt to unheard-of heights.

As a result, in the commercial construction marketplace, things were tough. Top Tech Mechanical's customers began bouncing checks. General contractors stopped paying for work done.

"I almost lost my house because of

all this," Newman says. "But I hung in there. I got up and went to work every day until I finally landed some major restaurant accounts in Atlanta.

"During those years, we had some decent growth. I finally got up to where I had three trucks in my company and then added three sub trucks. By 2019 we employed six field technicians."

But problems persisted, and Newman realized he had hiring issues. His company serviced and installed heating and air conditioning rooftop units. They also worked on walk-in refrigeration systems and ice machines. And on top of all that, Top Tech repaired cooking equipment, replaced electrical circuits, modified gas lines, and more.

He says he realized there are not many people who can work on such wide-ranging projects.

THE PANDEMIC: A GOOD THING?

In early 2020, because of the pandemic, Top Tech was forced to shut down for nearly three months because commercial project work came to a grinding halt.

"We were an all-commercial company that did some residential air conditioning. We worked with Goodman Manufacturing on the residential side of our business.

"I realized I had all my eggs in one basket and needed to diversify, to re-engineer my business structure. I needed to

Around the table left to right: Peggy Newman, Kevin Newman, Mike Carver, and Domingo Evans.

Kevin Newman credits Mike Carver, Top Tech's #1 technician for continuously providing high-quality services for their customers.



focus on targeting clients who aren't so linked together that when something like a pandemic happens, they all crash, and you have no income."

He says this may have been the best thing to happen to him!

"It forced me to look at my company and the future. I knew we had to buckle down and keep my team working. We had to be relentless in our efforts."

Those efforts kept the company alive during 2020, and after eight years in business, Top Tech Mechanical closed out that awful year, bringing in around \$350,000 of gross revenues.

GOODMAN ACCELERATED HVAC SUCCESS PROGRAM

With commercial businesses closing down, Newman decided it was time to explore changing course and focusing Top Tech on the residential side of the industry. Through his involvement with Goodman, he signed up with their *Accelerated HVAC Success Program* (ncilink.com/ACCSuccess).

Goodman's program is a series of virtual training modules that helps six HVAC contractors to thrive in the new normal created by COVID-19. The contractors shared stories on how their businesses were transformed. Participants could apply the lessons learned to their own heating and air conditioning businesses.

During this training, Newman met David Holt of National Comfort Institute (NCI) and learned about the

High-Performance HVAC approach to delivering comfort.

"The Goodman program and David Holt helped me to wrap my mind around the idea that ventilation is the key to properly delivering heating and air conditioning throughout the home. This led me to decide to be more focused on residential HVAC and to stop being a *Super Walmart* kind of contractor," Newman explains.

After completing the program, Newman became a member of National Comfort Institute, and began making use of all online training videos.

"We're also doing weekly training with John Puryear. He's helping coach my guys to implement the NCI methodologies as far as airflow and getting the correct data, then knowing what to do with it.

Newman adds that the Goodman and NCI programs have helped to rejuvenate him personally.

"The Goodman program got me fired up again. Through it, I met other contractors with experience in what I was going through who helped me."

HIGH-PERFORMANCE HVAC AND WHAT IT MEANS

Newman says, "As we work with customers in our service area, we often

Kevin Newman credits long-time assistant manager Trevor Greco (not pictured) for helping to keep the company on target. Trevor recently left Top Tech for another opportunity.

hear them complain about why their system is so noisy, or inefficient, or just not keeping them comfortable. Most contractors can't answer those questions and often chalk it up to bad luck, or they say things like, 'it is what it is.'

"But we go in and measure their system to see what's lacking. We can show customers what we find. And we can fix it. That is what I want us to be known for."

This year Top Tech is still in the middle of its transition from commercial to residential. Kevin Newman admits his residential marketing — both traditional and digital — is not yet fully developed. "But we are getting there," he adds.

"Today, I have a department in my company that specializes in duct renovations and repair. I am hiring technicians who can troubleshoot, get the job done, get it done right the first time. There's a lot of good heating and air conditioning residential techs out there. I have to find them, bring them in, and build my com-

pany around their skill sets.

“The good news: our duct renovation department is already having an impact. We can see what air upgrade work is doing to our online presence. We’re finally starting to get some traction locally.

“Ultimately, my goal is for Top Tech to be 90-95% residential and 10% commercial. It’s nice to have restaurants with preventive maintenance accounts and service agreements. We are not fully high-performance based yet. Part of that is that I haven’t implemented it properly. We are working on that.”

He adds that with COVID seemingly under control, the phones are ringing off the hook, and they have a lot of business. Now it’s simply a matter of overcoming time challenges.

“Once we get our performance pro-

cesses in place, I know it will be highly effective, Newman says.

So far in 2021, he says his team has already beaten three out of the first five months of the best year they ever had! The company employs four people – Kevin himself, his wife, and two technicians.

He says they own three trucks and are actively hiring, hoping to bring the total employee count up to seven in short order.

FINAL THOUGHTS

Top Tech Mechanical is a small company with big aspirations. After so many rocky bumps in the road, Kevin Newman says he believes they are finally on the right path, the performance path. Testing, measuring, and

retesting systems is the fulcrum on which he wishes to balance his business. He says it is an approach that helps him achieve his true goal – genuinely taking care of his customers.

He has learned from past experiences and is learning from new ones. Each step he and the Top Tech team takes moves them closer to doing what they say they will do, so customers get the best service available in his market area.

“To me,” he concludes, “we’re in business to do the best we can and learn more each day.”

It is for these and so many other reasons that the team at **High-Performance HVAC Today** magazine shines this month’s **Contractor Spotlight** on **Top Tech Mechanical** of Kennesaw, GA. **NCI**



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The Cost of Non-Conformance or "Are Your Shoes Tied?"



From my experience working in manufacturing, research and development, and product support, I learned that **non-conformance to specification** is one of the primary causes of errors and product defects.

On the other hand, strict process control (consistent methods and clearly defined standards) yields consistent results. The outcome is always based on input. I had a manager who used to put it this way:

"IF YOU DO WHAT YOU ALWAYS DID, YOU WILL GET WHAT YOU ALWAYS GOT."

What in the world does that mean? Here's an example:

If you keep putting your shoes on without tying the shoelaces, then your shoes will keep falling off. Or (worst case) you may fall flat on your face! In other words, bad habits, bad practices, and half measures consistently yield poor (sub-standard) results.

CONSISTENT RESULTS

To deliver high-quality, high-performing HVAC systems, we must consistently apply best practices and go beyond industry code standards. Good design, proper application, and quality installation are the keys to having the right balance between reliability, operating efficiency, and comfort. It's

like a three-legged stool: if any one of these elements is weak or missing, the stool tips over (fails).

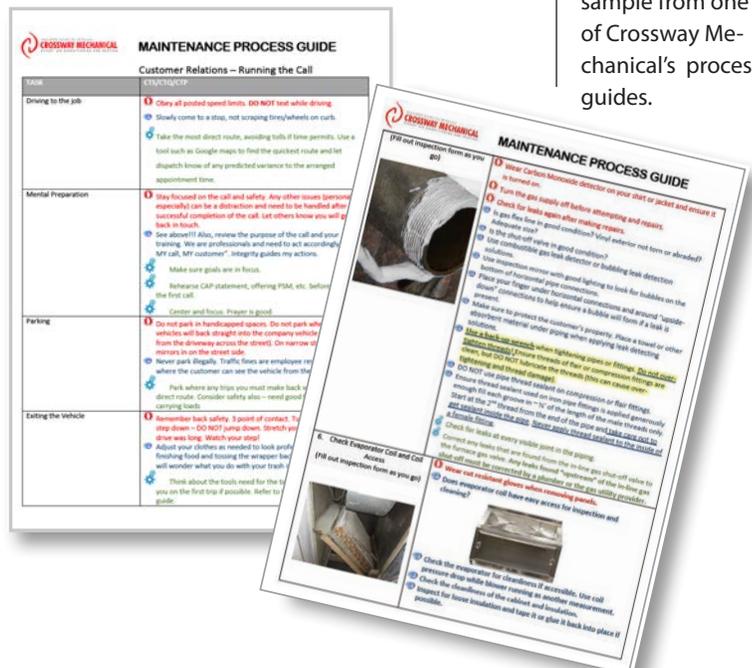
However, if it's **designed right, applied right, and installed right**, it will work right!

It seems like a no-brainer, right?

WRONG! Making this come together takes considerable thought, with collaboration from the whole team. AND it may require a culture shift, a change from an inherited mindset. At **Crossway Mechanical** in Tomball, Texas, we recognized that we paid tremendous prices when we made mistakes.

As a result, we work hard to become a more process-driven organization that uses the Six Sigma (ncilink.com/6Sigma) process control methods to ensure consistent results.

Figure 1: This is a sample from one of Crossway Mechanical's process guides.



NON-CONFORMANCE AND THE PRICE YOU PAY

So, what does non-conformance cost? With our “shoe’s untied” example, we might fall flat on our face, right in front of our paying customer who just spent good money for a properly installed comfort system. Is that what we want? No! We want to come off as polished, competent, and professional experts.

Non-conformance causes us to lose money because of **costly warranty callback visits** at company expense. Callbacks include all overhead costs (employee pay, vehicle wear-and-tear, gas, tolls, and the list goes on). I saw the following quote posted at a dealer in South Texas a long time ago:

“IF YOU THINK YOU DON’T HAVE THE (TIME) TO DO IT RIGHT THE FIRST TIME, THEN HOW CAN YOU POSSIBLY HAVE (TIME) TO DO IT OVER?”

Non-conformance also has a cost in terms of **valuable customer relationships**.

Callbacks and other non-conformance issues create customer inconvenience. Ask yourself whether customers like service personnel in their homes more than planned, and possibly at inconvenient hours.

Inconvenient callbacks also lead to **negative “word of mouth” reputation issues**. You see that cost in terms of poor online reviews with the BBB, the neighborhood blog, social media, etc.

Finally, the cost of non-confor-

mance impacts **employee morale**. Having to return to fix mistakes is a source of embarrassment to employees. What if we have to send them back on their own time? That hurts everybody!

VARIATION IS THE ENEMY

If we do not learn, grow, and strive for excellence, we will get left behind!

Think about it like this: when you get up in the morning, you typically have routines for good personal hygiene, proper dress, and grooming after having a good night’s sleep (shoes tied). By following such a routine, you will most certainly arrive at work on time, with your “head in the game.”

Do you also have a good routine for your HVAC business? Are the processes used in your business clearly defined? Do you have roles and responsibilities assigned? Are there performance standards? No? Not Yet? Well, you need to get that squared away.

HOW TO GET STARTED

First — think about each task — whether it’s parking, walking up to the door, or changing a compressor. What steps are involved in completing each task? What elements are critical to 1) SAFETY, 2) QUALITY, 3) PROCESS EFFICIENCY (in that order).

Next, document those elements in a logical sequence. Here is where collaboration comes in. With more than one mind at work, the team can better decide which step comes before another



David Small conducting an in-house training session with Crossway technicians.

er and if there is a potential problem when actions are done out of order.

Compare and align your quality metrics with industry best practices and current standards. There are currently six ACCA/ANSI standards related to the Quality Installation of a Refrigeration or HVAC system. This includes a new one introduced in late 2020 on “grading” an installed system’s performance. These can be found on the ACCA website at the link, [acca.org/standards/quality](https://www.acca.org/standards/quality).

In addition, there is a new ASHRAE/ANSI Standard (*Test Method to Field-Measure and Score the Cooling and Heating Performance of an Installed Unitary HVAC System*) which has a large impact on installation and service technicians. Check it out here: [ncilink.com/Std221](https://www.ncilink.com/Std221).

You need to ensure everyone has a clear process for their job responsibilities and understands it. That means training and reviewing. It’s a good idea to let your employees take turns training because “to teach something means to learn it twice.”

Finally, measure the success of your process control methods and adjust as needed. Did I mention that we are HVAC “practitioners?” That means we are constantly learning and improving. It’s no surprise that the ACCA/

ANSI standards refer to HVAC contractors as “practitioners.” Think of this the way we think about doctors and lawyers. Don’t doctors practice medicine? Don’t lawyers practice law?

What do you do if not everybody in your company is 100% on board? You can put everything on paper and conduct training, but can you run around behind every employee and check everything they do?

Well, you shouldn’t have to, even when mistakes are made. In comes another key phrase that has application in just about every area of life: “Where there is no consequence or reward, there is no motivation.”

So, focusing on the positive, there’s a price to pay **FOR** conformance too — and that is the investment you make

rewarding good behavior. Are your techs NCI certified? Are you? Will you pay for that? Does it mean anything (Pay, Position, Self-Esteem)?

THE REWARD!

If the cost for conformance is how you reward good behavior, just what does that entail. Below are a few points:

- A **better bottom line** due to reduced warranty expense and improved sales
- **Great reviews**
- **Happy customers**
- Team members who take **pride in their work** because they are growing and getting rewarded by your investment in them
- **Better employee retention** be-

cause people who enjoy doing what they are good at doing will stay.

To the team at Crossway Mechanical, the cost of conformance is much less than the cost for non-conformance. The result is better success, job satisfaction, and a scalable process that can be easily taught and passed on.

If you would like more information on how we make this work in our company, please feel free to call me. 

David Small is the manager of Quality Assurance and Technical Excellence at Houston-based Crossway Mechanical LLC (crosswaymechanical.com). You can contact him by email ncilink.com/ContactMe.



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Indoor Humidity Problems and Solutions (Part 2)

If you missed Part 1 of this article, got to ncilink.com/HumidityIssues1.



HOW CAN YOU HELP A CUSTOMER MANAGE HUMIDITY?

Offer them a two-stage system with a multi-speed blower as an option. Many of these systems run at around 60% of capacity for a portion of the on-cycle, so they tend to run longer, and more dehumidification takes place.

While two-stage systems can help to some degree, that often won't be enough to truly maintain optimal humidity levels. That said, an improvement is an improvement, and if that's what the customer can afford, then it's your job to make it happen.

The more exciting option for customers like Suzy may be the fully modulating variable capacity or "inverter" system.

These systems can reduce capacity even further, resulting in very low cost, longer runtimes, and much better dehumidification over a wide range of conditions.

They can also help maintain a humidity setpoint that will allow the system to run for dehumidification, as long as the temperature is above the lower limit set-up at the thermostat.

Let's address the issue this way. By design, an inverter system adjusts capacity base on the load.

Therefore, when outside conditions require the removal of 18,000 Btus per hour, the three-ton system adjusts the compressor and blower to operate more like a 1.5-ton system.

This allows the removal of heat *and* removes the proper amount of moisture due to the longer run time.

In fact, Suzy can now set the system to provide a stable 50% RH along with a 75°F temperature set point.

Once Frank and Suzy understand why she is uncomfortable in her home and understand that an option is available that resolves the issue, they may not allow anything but a variable capacity system to be installed.

This occurs far more often than experienced contractors might suspect.

LOW HUMIDITY IN HEATING SEASON

The obvious solution for adding humidity in the winter is to add humidifiers. Many folks do this by buying a cheap standalone humidifier.

In Northern Montana, Ben doesn't need central air in his home, so he has gone with standalone humidifiers. At first, he and his wife bought a single humidifier from a box store for around \$30.

It turns out that these humidifiers are only designed for a single small room, such as a bedroom. These devices also run out of water and need to be refilled at least once or twice every day.

After dealing with dry air in every room for years, he bought another similar unit for his bedroom and a larger one for the main living area. With these three humidifiers he can keep the indoor humidity between 35% and 45% RH all winter. but they must remember to fill them at least once a day.

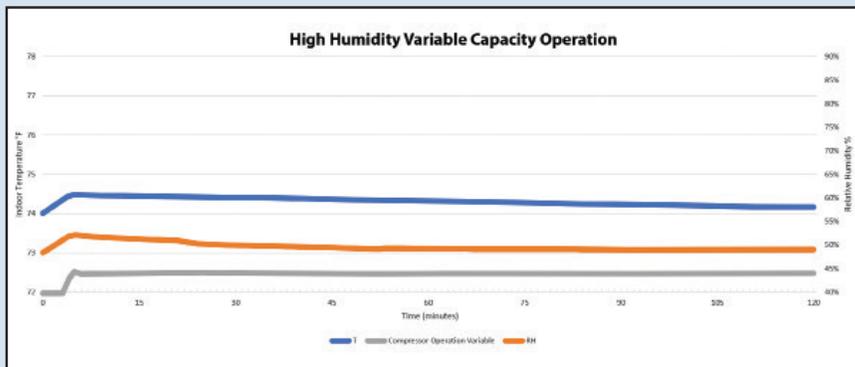


Figure 4. High Humidity Operation: 81°F, 88% RH Outside; 75°F Thermostat Set-point, 50% RH Humidity Setpoint, Variable Capacity down to 35%. The system runs almost the full two hours at an average of 42% of its full capacity. Humidity is maintained at an average of 49% RH, and both temperature and humidity are controlled much more tightly than with the single-speed system.

Furthermore, standalone humidifiers need to be cleaned regularly to prevent build-up of hard water deposits and bacteria. To be honest, it's quite a hassle to regularly fill and clean three humidifiers!

For those who are tired of dealing with dry air or the day-to-day hassle of the cheap units, whole-house humidifiers can be integrated into the central heating system and plumbed with water. This is where HVAC contractors come in. As a contractor you can offer to solve the problem of dry air and minimize hassle when you're replacing their central heating or cooling by adding this into the package with your higher tier options. This can be that little touch that differentiates you from the other guys the homeowner is getting bids from.

The addition of a whole-home humidifier is also a great talking point for selling maintenance agreements. Whole-house systems are great, but being out of sight and out of mind, serious maintenance issues can arise. If you don't clean the system and replace filters at least once a year, bacteria will grow, and the system might become clogged and stop working. Maintenance is a must with these systems and it can be the tipping point that convinces customers that they need your services.

SYSTEM SIZING, INSTALLATION, AND MAINTENANCE

Beyond equipment-based solutions, it's also important to properly size, install, and maintain the complete system for optimal humidity management in both the heating and cooling seasons. Here are three actions every contractor should do:

● **Perform a load calculation and right-size the system.** Oversized systems result in higher indoor humidity levels during cooling season because runtimes are shorter.

● **Ensure ducts are properly sized, insulated, and sealed.** Leaky return ducts draw in humid air during summer and dry air in winter. Leaky supply ducts create negative building pressure and cause humid or dry air to infiltrate through the building shell.

● **Beyond the HVAC system itself, it's also important to consider the "building side of the duct system."** A leaky building shell will result in higher humidity in the cooling season and lower humidity in heating season.

By installing properly sized and high-performing systems, you give today's advanced equipment the best chance of keeping customers comfortable and healthy, and their utility bills low.

KEEPING CUSTOMERS COMFORTABLE, HEALTHY, AND HAPPY

The key is explaining humidity and comfort issues to customers, then offer potential solutions. This approach provides them options. But understand that too many options can overwhelm a customer. Three options seem to be about right.

It's important to define the options in terms that relate to the effect on the homeowner's family (not the technical terms), and always provide a financing strategy that makes all the options equally affordable from a monthly budget perspective. This may sound odd, but to experience the most success, don't try to up-sell a customer. Just educate them and provide understandable options.

For more information on effective

customer-focused sales, contact Dennis Mondul to schedule a *High-Efficiency Sales* workshop. When it comes to ensuring the entire installed system performs to design, NCI and others offer classes on how to measure and improve system performance using real data.

In the meantime, if you want to take the first simple step in upping your game by serving your customer like no other contractor, there is a way. Differentiate your company from box-swapping competitors by showing the customer how to affordably solve problems that had previously been perceived as unresolvable. Humidity might be at the heart of your customer's problems, and your competition isn't even mentioning it!

At this point we would like to make a prediction: The next generation of cutting-edge HVAC contractors will be known as the best because they affordably manage temperature, humidity, and airflow when they work for a customer. Ask yourself this: if you're not thinking about humidity when you talk to customers, what are you (and they) missing out on? 



Ben Lipscomb is a registered Professional Engineer with over 14 years of experience in the HVAC industry including laboratory and field research, Design/Build contracting, and utility energy efficiency program design. He is National Comfort Institute's engineering manager, and may be contacted at ncilink.com/ContactMe.



Dennis Mondul from HVAC Contractor Solutions (HCS), has been doing consulting and training for HVAC contractors in North America since 1992. For answers to any questions regarding this article, contact him at 561/202-4371. You can also reach him at dennism@hvaccslc.com or submit a question at hvaccslc.com.

BUSINESS PERFORMANCE

THIS TIME IT'S PERSONAL

NCI'S ALL-NEW
conference design
let's you **personalize**
your experience based
on your knowledge and
comfort level
with each topic!

High- Performance HVAC Summit 2021





Personalize your summit experience!

NCI's **High-Performance HVAC Summit** has become the gathering place for Performance-Based Contractors from across North America. It's the only event of its kind completely focused on selling and delivering High-Performance HVAC systems.

This conference is open to the entire industry. Summit is a welcoming gathering of like-minded people who are open and willing to share with their fellow performance-based professionals.

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 just 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 just 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. 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!

Be Sure to Bring Your Key People

With the 3 different levels of sessions available there will be 18 different break-out workshops to choose from! With so many breakouts we recommend you bring at least 3 people this year. Be sure to check out our special 3-Pack offer!

Visit the Summit Week website at GoToSummit.com to reserve your seats for what is shaping up to be the best Summit ever. Seats are limited this year and going fast, so don't delay, register for Summit 2021 today—and take your High-Performance HVAC business to the next level!

SPECIAL EVENTS

Welcome Reception & Celebration: Meet up with old friends and make new ones at this Welcome Extravaganza. Join your fellow Contractors from across North America to celebrate our industry's resilience during the tough times of the past year.



NCI Partners Reception and Trade Show: Our Partners help make this conference possible. Show your appreciation by attending the trade show events. You might find that next great product or idea!

Idea Meeting: All contractor attendees are invited to this 2-part event where each participant can propose one or more ideas in the areas of lead generation and sales. Don't forget to bring your ideas and \$20 entrance fee. The best ideas split the pot for great cash prizes!

NCI Partners Educational Sessions: Pick from several special sessions hosted by NCI Member Rewards Partners. Topics will range from new HVAC technologies, to software, to business improvement seminars.



Awards Banquet: This long-standing tradition is one of the highlights of every Summit. Join us in honoring the best of the best High-Performance HVAC contractors. You may be one of them!



Breakout Sessions

SESSION ONE: Airflow Diagnostics and Air Upgrade Workshops



NOVICE: Use AirMaxx Lite™ To Educate Your Customer **How A Simple App Can Help Customers Understand Static Pressure And Airflow**

Workshop Leader: David Holt

Properly measuring and understanding Total External Static Pressure (TESP), provides clues as to why your customer's heating and cooling system is not operating as well as it should. Poor airflow resulting from excessive static pressure at the fan can result in uncomfortable rooms and inefficient operation. Identifying and solving static pressure issues leads to happier customers and profitable sales.



PRACTITIONER: Airflow Hoods: The Go-To Test Instrument For Air Upgrades **Get The Most From Your Airflow Hood Investment!**

Workshop Leader: Rob Falke

One of the key factors in designing an Air Upgrade is knowing delivered airflows at the registers and grilles. A flow hood or air capture hood is an essential tool for quickly identifying poor airflow. In this workshop NCI's own "Doc" Falke will show you the different types of hoods, and what works best for residential diagnostics.



MASTERY: Identify Duct Insulation Defects In Three Easy Steps **Sharpen Your Duct System Diagnostic Skills**

Workshop Leader: David Richardson

When ducts aren't properly sized, sealed, and insulated they can cause long runtimes, discomfort, and wasted energy use. Learn how to quickly identify duct insulation defects in three simple steps. You will also learn how system temperatures are so important to overall comfort and system performance.

SESSION TWO: High-Performance Sales Workshops



NOVICE: Generate Leads For Profitable Air Upgrades **Help Your Customers Understand What An Air Upgrade Can Do For Them**

Workshop Leader: John Puryear

It's not enough to measure static pressure on your service and sales calls. To convince your customer to take action, you need to be able to communicate your findings and what the readings mean in terms they can understand.



PRACTITIONER: So You Have A Diagnostics-Generated Lead. Now What? **How To Build An Air Upgrade & Renovation Sales Machine**

Workshop Leader: Rob Falke

Each of your company's customers is already an Air Upgrade lead. In fact, they already want it, but don't yet know what it is, what it can do for them, or where to get it. When you perform static pressure testing on every service call, your company already has what it takes to generate these valuable leads.



MASTERY: How To Price Profitable Air Upgrades & Renovations **Price Air Upgrades And Duct System Renovations Based On Their Worth**

Workshop Leader: David Holt

When pricing high-performance system upgrades and renovations, you must focus more on the lifetime value delivered and less on the estimated job cost. When you only consider raw costs, you minimize the craftsmanship involved in creating the high-performance results associated with your customer-built solutions.

SESSION THREE: High-Performance Implementation



NOVICE: Build Craftsmen, Not Laborers

How To Overcome Flawed Perceptions With Your Installers

Workshop Leader: Casey Contreras

Craftsmanship is no easy task. It's not something you're born with, rather it develops over time with mentorship. The truth is, to make a great system design work requires a craftsman to install it correctly. Unfortunately, most installers don't understand the important role that they play in delivering high-performance systems.



PRACTITIONER: How to Create Custom Air Upgrades

Make Air Upgrades The Center of Your High-Performance Strategy

Workshop Leader: David Richardson

Air Upgrades are the perfect starting point for improving equipment performance as well as improved comfort and energy efficiency. In this session you will learn how to assemble customized Air Upgrade kits based on the install conditions you see most.



MASTERY: Are You Losing Money Due To Poor Inventory Management?

Minimize Job Cost With Better Inventory Management

Workshop Leader: David Holt

Your sales team can make a profitable sale on paper, only to have the profits evaporate due to ineffective inventory management processes. From truck stock to installation and Air Upgrade kits, this workshop will help you learn ways to be more profitable through a well-designed and executed inventory management plan.

SESSION FOUR: Take it to the Next Level With High-Performance Software



NOVICE: Use ComfortMaxx Air™ On Every System You Test!

How To Make ComfortMaxx Air The Most Valuable Tool In Your Arsenal

Workshop Leader: John Puryear

Discover how NCI's [ComfortMaxx Air™](#) software can help you win over more customers and sell more Air Upgrades by demonstrating third party validation of your findings.

PRACTITIONER: ComfortMaxx Pulse™ System Performance Testing

Help Turn Your Techs Into Diagnostic Machines

Workshop Leader: Casey Contreras

In this session, you will learn how NCI's [ComfortMaxx Pulse™](#) software can aid you in your diagnostics and customer participation. This tool will help make your technicians diagnostic "machines." The workshop will cover each of the steps needed to collect the right pressures and temperatures, and generate a Pulse report you can review with your customer.

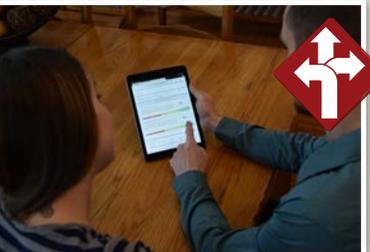


MASTERY: Total HVAC System Rating With ComfortMaxx Verify™

The Ultimate System Performance Verification Tool

Workshop Leader: David Richardson

Learn how to prove the performance of your field-installed systems with NCI's [ComfortMaxx Verify™](#) software. In this ground-breaking session, you'll discover how system verification can provide your customers with the ultimate piece-of-mind — and how it sets you apart from your competition.



Breakout Sessions

SESSION FIVE: High-Performance Town Workshops



NOVICE: Develop Good Static Pressure Habits

Hands-on Workshop Leader: John Puryear

Static pressure testing quickly opens the door to airflow diagnostics. This simple test can uncover unseen opportunities for technicians and salespeople, and help installers provide higher quality installations.



PRACTITIONER: Master True Airflow Diagnostics

Hands-on Workshop Leader: Casey Contreras

When it comes to HVAC system diagnostics, our industry has been using rules of thumb for far too long. These practices continue to cause misleading diagnosis and improper repairs—not to mention occupant discomfort, unhealthy homes, safety issues, and needless energy waste.



MASTERY: Avoid The Top 10 Btu Measurement Mistakes

Hands-on Workshop Leader: Rob Falke

Btu measurement is a critical and exacting practice. Errors of just a few tenths of a degree can result in a major misdiagnosis and improper repairs. Discover Btu measurement mistakes that can easily be avoided in the field so you can accurately provide correct equipment and system diagnostics.

SESSION SIX: Carbon Monoxide and Combustion



NOVICE: Two Must-Do Combustion Safety Tests

Keep Your Customers Safe!

Workshop Leader: Tom Johnson

Ambient CO and building pressure testing are critical to help assure both technician and customer safety. In this workshop you'll learn how to measure ambient CO, what test equipment you need, the action levels your team needs to know, and how to discuss your findings with customers.



PRACTITIONER: Vision Beyond Sight with Combustion Testing

Give Your Customers The Value They Deserve

Workshop Leader: Casey Contreras

The right knowledge and test instruments can help give you X-ray vision when it comes to combustion testing. There are a lot of myths out there that can lead you astray. We will expose the most common ones and debunk many of these misconceptions.



MASTERY: Advanced Venting And Combustion Air Solutions

Solve Even The Toughest Combustion Issues

Workshop Leader: Jim Davis

In this session, Jim will focus on why proper combustion testing is crucial to identify the right repairs and how to determine the most effective solutions. You will discover why venting and combustion air repairs are important and ways to help your team understand and explain them.

Session Speakers



Casey Contreras

NCI Field Coach and Instructor

Session Three — Novice: Build Craftsmen, not Laborers

Session Four — Practitioner: ComfortMaxx Pulse™ System Performance Testing

Session Five — Practitioner: Master True Airflow Diagnostics

Session Six — Practitioner: Vision Beyond Sight with Combustion Testing



John Puryear

NCI Customer Care Representative and Instructor

Session Two — Novice: Generate Leads For Profitable Air Upgrades

Session Four — Novice: Use ComfortMaxx Air™ on Every System You Test!

Session Five — Novice: Develop Good Static Pressure Habits



David Holt

NCI Director of National Accounts

Session One — Novice: Use AirMaxx Lite™ to Educate Your Customer

Session Two — Mastery: How to Price Profitable Air Upgrades & Renovations

Session Three — Mastery: Are you Losing Money Due to Poor Inventory Management?



Rob Falke

NCI President

Session One — Practitioner: Airflow Hoods: The Go-To Test Instrument for Air Upgrades

Session Two — Practitioner: So You Have a Diagnostics-Generated Lead. Now What?

Session Five — Mastery: Avoid the Top 10 BTU Measurement Mistakes



David Richardson

NCI Curriculum Developer and Instructor

Session One — Mastery: Identify Duct Insulation Defects in Three Easy Steps

Session Three — Practitioner: How to Create Custom Air Upgrades

Session Four — Mastery: Total HVAC System Rating with ComfortMaxx Verify™



Tom Johnson

NCI Instructor

Session Six — Novice: Two Must-Do Combustion Safety Tests



Jim Davis

NCI Senior Instructor

Session Six — Mastery: Advanced Venting and Combustion Air Solutions



Dominick Guarino

Publisher of High-Performance HVAC Today and CEO of National Comfort Institute, Inc.

General Sessions

Award Banquet and Presentations Ceremony



Mike Weil

Editor-in-chief of High-Performance HVAC Today and Director of Communication at National Comfort Institute, Inc.

General Sessions MC: Idea Session Winners



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SUMMIT WEEK 2021

SCHEDULE OF EVENTS

MONDAY, August 30

Pre-Summit Events

- 8:00 am - 4:00 pm Goodman Inverter Day
8:00 am - 5:00 pm Advanced Airflow Diagnostics with Hands-on -Recertification Class
8:00 am - 5:00 pm Advanced CO & Combustion Diagnostics - Recertification Class
5:15 pm - 5:45 pm Summit Orientation Meeting - All Welcome!
6:00 pm - 8:00 pm Welcome Reception *Sponsored by Goodman*



TUESDAY, August 31

- 7:00 am - 9:00 am Breakfast and Interactive Opening Session
9:15 am - 10:45 am **Breakout Sessions 1 - Workshops**
11:00 am - 12:30 pm **Breakout Sessions 2 - Workshops**
12:30 pm - 1:30 pm Luncheon and General Session
1:30 pm - 3:00 pm **Breakout Sessions 3 - Workshops**
3:30 pm - 5:00 pm Idea Exchange Meeting - Optional
6:00 pm - 8:00 pm NCI Partner Trade Show Reception

WEDNESDAY, September 1

- 8:00 am - 9:15 am Breakfast & State of High-Performance HVAC with NCI CEO, Dominick Guarino
9:30 am - 11:00 am **Breakout Sessions 4 - Workshops**
11:15 am to 1:15 pm NCI Partners Trade Show and Luncheon
1:30 pm - 3:00 pm **Breakout Sessions 5 - Workshops**
3:30 pm - 4:15 pm NCI Partners Educational Sessions
4:30 pm - 5:15 pm General Session: Idea Session Winners and Partner Prize Drawing
6:00 pm - 7:00 pm Sponsor Appreciation Cocktail Reception
7:00 pm - 9:00 pm Awards Banquet and Presentation Ceremony

THURSDAY, September 2

- 8:00 am - 9:30 am Breakfast & General Session
9:45 am - 10:30 am NCI Partners Educational Sessions
10:45 am - 12:15 pm **Breakout Sessions 6 - Workshops**
12:15 pm - 1:30 pm Closing Luncheon with NCI President, Rob Falke



EVENT & LODGING



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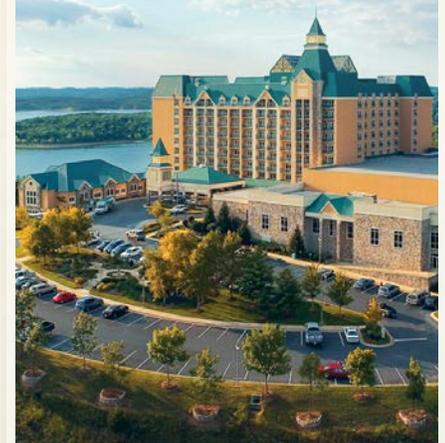
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Where To Start with Your HVAC Digital Marketing in 2021

With more families working from home, the quest for home service contractors to be “the option” for consumers searching for help and answers on Google has never been more critical. These past few years have paved the way for an evolution of the HVAC industry as consumer expectations continue to evolve.

CONSUMER EXPECTATIONS

Here is a shortlist of basic consumer expectations in today’s climate. These expectations are driving the decision-making at HVAC, Plumbing, and Electrical contractors.

- Consumers want to find the best solutions in the organic search results on Google but don’t want advertising following them
- They want to shop online for good, better, best options versus having someone presenting options at their kitchen table
- They expect to see your financing options before your presentation
- Customers want an exceptional experience after 5:00 PM and on weekends
- They want to be able to chat, text, call, schedule, shop, pay, and subscribe to services online
- Searchers want to see relevant promotions

based on their needs

- Consumers care about your Google reviews and online reputation more than the reviews you choose to display on your website.

These expectations, along with a year of lockdowns and social distancing, have led to significant changes in the marketing and sales universe.

Virtual sales appointments, eCommerce solutions, text notifications, workflow automation, AI chat, virtual receptionist, and online subscription systems all seemed like ideas that didn’t apply to the HVAC industry until now.

Additionally, consumers are numb to traditional advertising and embrace a more organic process to find solutions, services, and companies. This approach alters the HVAC industry’s strategy, with many contractors starting to move away from old-school paid advertising and embracing web, content, social, and organic marketing.

Organic advertising is a cousin of word-of-mouth advertising. Companies use organic advertising to take advantage of online search engines, video, local, and social networking sites.

Organic advertising provides clients with information about their products without the sole use of sales pitches — more in line with a referral or an educational process.

THE BENEFITS OF CHANGE (DIGITAL TRANSFORMATION)

The consumer's expectations for technology and ease of use, combined with a no-advertising preference, have created a blessing in disguise for business owners who feared adapting these principles in the past.

It has led many to invest in technologies and marketing strategies that are permanent and create a compounding interest impact on the business. They can now measure results instead of financially gambling on advertisements and old-school media.

In other words, the dollar they invest today is not merely gone when the campaign is over. It is leveraged and produces compounding results year over year.

LEVERAGING A CUSTOM ORGANIC-FOCUSED MARKETING STRATEGY

First, it's important to understand that this is a process, a lifestyle, not a project.

Creating a well-structured website, eCommerce system, content strategy, and organic Search Engine Optimization (SEO) plan can take you further and reach more prospective customers than traditional advertising methods.

However, it requires a dedication to the technical evolution process. Let's discuss some practical steps an HVAC company can take to ensure a successful HVAC marketing strategy.

CREATING AN AUDIENCE- BUILDING WEBSITE

What would constitute a great website? First, it must be user-friendly and have quick loading times. Optimization for mobile devices is vital. Up to

81% of users search online using their mobile phones.

The content on your HVAC website should be current, using call-to-actions, where appropriate, while offering deals and promotions to entice prospective customers. With a simple, catchy website layout and these tips, you should be good to go. An experienced HVAC marketing company can recreate your website and get it to operate with optimal performance.

Optimize Your Webpage for HVAC SEO. For your webpage to align with your goals, you need to analyze current website data to assess the way forward with your HVAC marketing strategies. Ensure your website loads faster by speeding up the pages.



Remember, faster loading times mean more traffic to your website and are part of the end goal: more paying customers! You should have a proper **backlink strategy** to drive up your website's online reputation score.

Backlinks, by the way, are links from outside your website that point to pages on your website. In other words, they link back to your website.

For more information on this, go to ncilink.com/backlinks.

Local Directory Listings. As an HVAC contractor, marketing and advertising once were as simple as listing your business in the Yellow Pages.

In today's online environment, your website is your shop, and your customers are those who visit the website and book your services.

When you listed your HVAC company in local directories, customers searching for local contract services see your website, get the link to your website, or call you directly. This type of optimization will give you a tidy Return on Investment (ROI) that boosts any SEO plan significantly.

Pay Per Click Advertising. As part of an HVAC Digital Marketing Toolbox—Pay-Per-Click advertising is beneficial as a short-term investment.

Every time a prospective customer clicks on your ad and visits your website, you'll pay for that visitor. It's a highly effective tool in propelling your HVAC company up the rankings in search results, giving a listing at the top with the label "Ad."

One note: you should always use a paid advertising campaign online, in tandem with organic marketing strategies (SEO).

Make sure to think about the overall strategy and budget when planning your online marketing.

Plan on being able to comfortably start and stop paid ads depending on the weather. 



Jennifer Bagley is the president of CI Web Group, a digital marketing company specializing in the HVAC industry. As Jennifer says, "HVAC marketing is our niche. We'll guide you through the process of growing your

business online by implementing the right things, in the right order, at the right time." For more information, go to ciwebgroup.com for a free digital evaluation or contact Jennifer at ncilink.com/ContactMe.

So, You Have a Diagnostics-Generated Lead. Now What?

The first critical ingredient to create a system upgrade sale is your conviction that each system needs more than equipment replacement. Your ability to successfully sell more than a box swap depends on being able to communicate that conviction. You'll use it along with your skill, expertise, and creativity to deliver a custom system built on the foundation of diagnostics.

Let's take a look at the events you'll arrange in your customer's homes to help them understand their system, discover its failings, and get them to ask for help improving the performance of their system.

Let's also acknowledge upfront; this new system will usually cost more than they anticipated. Your job is to help customers learn enough about it, so they're delighted to pay the higher price. If they're not, you have done a disservice. Sadly, some will be unable to afford more than a box, and that's OK.

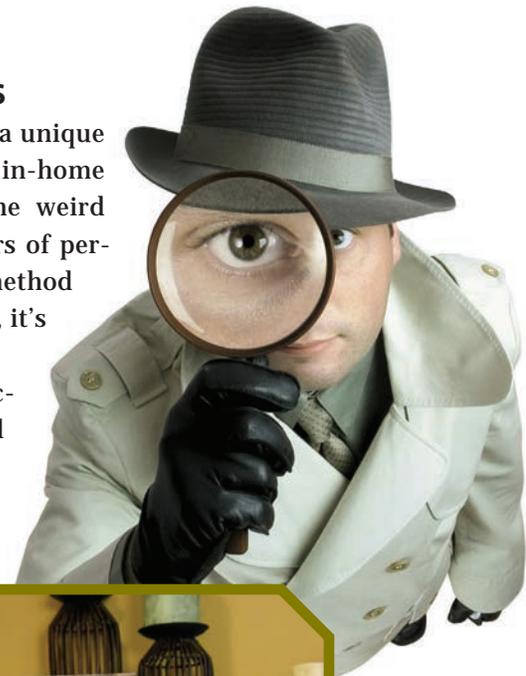
Fortunately, if you have a diagnostic lead in hand, your customer has shown some level of interest in system upgrades and may want more.

This sales approach is very different than what is practiced within the general HVAC industry and taught by its best sales trainers and manufacturers.

A UNIQUE SERIES OF EVENTS

It's up to you to orchestrate a unique set of events that we'll call an in-home *Learn-Omercial*. Sorry for the weird word, but after nearly 40 years of personally practicing this sales method and trying to teach it to others, it's the most accurate description.

If you carefully study, practice, and develop your brand of in-home *Learn-Omercial*, following these principles, I can promise you increased



success and enjoyment in your sales efforts. Typically, sales closing rates nearly double, margins and profit naturally increase, and you'll never need to exert pressure on a customer again.

This unique series of events will result in a successful sale the moment that you and your customer discover any issues together and agree upon their resolution. You have now made this the homeowner's custom project.

As you develop and master your Learn-Omercial style, you will have no competition. The product you create for customers is a truly customized product. Your system upgrades will give customers more than any self-proclaimed competitor can.

A diagnostics-generated lead flows into a sales process unlike anything else. You'll notice several new steps to take and old ones to eliminate as you recreate how you sell. Like any change, it can be challenging to create and capture your vision of how to tutor and coach your customers to discover what you have available for them.

FIRST SALES CONTACT

Whether your first sales contact is on the phone, in an email, or at the front door, having test results and an initial diagnosis in hand, you're uniquely qualified to change the normal sales conversation.

Understand that the Learn-Omercial is already underway, and the diagnosis becomes the foundation

upon which you rely throughout your visit. At this point, the spirit of your visit is to help customers understand their system defects and discover the solutions.

Don't worry about selling until your customer completely understands what you offer and what they will get from it. This approach mirrors the elevated sales position of a service tech. Be like the technician whose initial greeting is "Hi, I'm here to help."

AT THE KITCHEN TABLE

Remember, the Learn-Omercial is rolling out. Keep your conversation focused on diagnostics, and don't fall back into old comfortable habits.

A typical industry sales call begins with a monologue about the virtues of your company and the superiority of the manufacturer you represent. Blah, blah, blah.

With the diagnostics approach, speak only briefly about the values of your company and your relationship with your manufacturer. Let your primary message be conveyed by what YOU do with and for your customer.

People care about the value they receive for their money and that they are making a smart purchase. They show interest in diagnostics when they agree to your visit, so talk about the issues the diagnostics revealed. Learn more detail here: ncilink.com/Translate.

Now it's time for a discussion leading to the next level. If the diagnosis is high static pressure, teach the customer about it and ask questions to engage them in the discussion. They want to understand this pressure thing and how it affects them.

Some good questions to ask include,

See Rob Falke During NCI Summit 2021

The High-Performance HVAC Summit 2021 is happening in person from August 30 to September 2, 2021 in Branson, MO. Our theme this year is "*This Time It's Personal*," and it reflects the first live gathering of High-Performance HVAC contractors since the start of the pandemic.

National Comfort Institute (NCI) President Rob Falke is one of eight speakers showcasing the positive impact of high-performance on your companies. This article is based on Rob's upcoming session.

This in-person Summit will include the **Tradeshaw** (where you can learn about the latest products and services from our industry partners), **several general sessions**, the popular **Idea Meeting**, and our coveted NCI contractor and individual **award presentations**.

Summit 2021 offers you and your team the opportunity to make it personal: You can customize your program based on where each of your team members are on the **Path to Performance**. Each breakout has three options, totalling 18 personalized learning opportunities. The options are for those at the **Novice** level, the **Practitioner** level, and the **Mastery** level.

Learn more about the 2021 High-Performance HVAC Summit online at GoTo-Summit.com.



“Have you replaced your filter with a high-efficiency one recently?” “Did you notice if any room airflows seem lower lately?” “Have you had anyone crawl through your attic in the last couple of months?”

Each of these questions can lead to discussions that engage customers deeper into the diagnostics and the solution. Take time to explain and discover with them. Can you see what’s happening?

SIMPLE DEEPER DIAGNOSTICS

Each diagnostic test has a cousin test that reveals a little more of the picture. If your Learn-Omercial is working, customers will eagerly engage in some very simple diagnostics with you. Invite them to join in the discov-

ery process and get them up and moving with you.

EACH TIME YOU HELP CUSTOMERS DISCOVER SYSTEM DEFECTS, THEY DECIDE TO BUY INDEPENDENT OF YOU. IT’S THE EVENTS YOU COACHED THEM THROUGH THAT DID THE SELLING.

The discovery process may be a simple inspection of a suspected problem you identified together, maybe checking whether that new filter is restrictive. Or it may be taking a static pressure profile at equipment if it is

accessible, or finding closed dampers.

My favorite approach is taking the customer into the most uncomfortable room, then helping them estimate airflow.

Say you help them calculate 125 beach balls of air per minute (read ncilink.com/beachballs for a full explanation). Then invite them to measure the register airflow with a balancing hood.

Be still. Say nothing when the hood measures just 38 and watch the Learn-Omercial work its magic.

Measure supply and return duct static pressures and compare your results to 20% of rated static pressure. Be sure you teach them what the maximum pressure should be before measuring it. When it’s high, ask them

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what might cause the high pressure. Be patient and give hints to help them find solutions when appropriate.

If duct temperature loss is the initial diagnosis, one quick and effective diagnostic you can do together is to place a temperature probe in a return grille and supply register farthest from the equipment.



Set the system to fan only and let it run. When duct heat gain or loss is present, the home gets uncomfortable in a few minutes. Calculate the difference between the supply and return air. It should be zero. Watch their faces as they learn and let the test data build their desire to own a solution.

When you allow customers to discover a system defect through diagnostics, they become highly motivated to fix the system. They're not buying your recommendation; they want to hire you to repair the problem they discovered themselves.

BUT WHEN DO I START SELLING?

Did you miss it? It already happened. The customer made the sale for you as they participated in your Learn-Omercial. They learned about their system and decided they wanted the solutions only you can offer.

Each time you help customers discover system defects, they decide to buy independent of you. It's the events you coached them through that did the selling. They want the sale each time they ask, "Can you fix this?"

EVERYTHING ELSE IS PAPERWORK

During the Learn-Omercial, it's your job to take notes to define the work for the inventory team and installers. You form the scope of work while you uncover each system defect to be corrected. NCI has reports to help you identify the scope of work.

As each flaw is uncovered during diagnostics, briefly explain to your customer how you'll fix it. They usually don't care; they want to hear you are fully qualified to make the repair.

It's not time to write a proposal yet. It is time to talk about the customer's repair priorities. Price comes up at this point. So, pull out your phone and answer the six questions in your trusty NCI Air Upgrade Price Calculator or use your flat-rate pricing. Discuss and agree upon upgrade priority and price.

Lock down any outstanding decisions such as financing, project start/end date, construction details, and commitments for both of you.

Always include verification and final testing to prove you delivered what you promised.

Oh, how about equipment? At the kitchen table, you spoke about your relationship with your manufacturer. The customer trusts that relationship because they already bought you.

A discussion about types of equipment and costs is all you need at this point. Since they are purchasing the best system, isn't the best equipment

the obvious choice?

Before writing a proposal, settle any outstanding system issue details until you both agree. Nod in agreement, shake hands, or get a hug. Respond however your customer chooses to indicate total agreement.

THE PROPOSAL

Then create the proposal. Keep it brief when appropriate. You may include the most important points to your customer and whether you include equipment replacement.

Keep the scope of work minimal to deflect a spouse or others shopping your price.

JACK IN THE BEAN STALK

The seeds of a diagnostic sale look different from the seeds planted to grow a typical equipment replacement sale. Jack planted magic beans to make his dream come true.

The seeds you plant during the Learn-Omercial bring a sense of magic to the services you offer customers.

Why shouldn't an HVAC guy bring some magic into customers' homes?

The magic is in the Learn-Omercial and what they discover, think, feel, and receive from you.

If what you do in their home doesn't feel like magic, you're planting the wrong seeds. 



Rob "Doc" Falke is president of National Comfort Institute, Inc. His vision is that HVAC system performance can be effectively measured and diagnosed under live operating conditions in the field. NCI training enables contractors to measure, rate, diagnose and improve a system's rating or score. You can contact him at ncilink.com/ContactMe.

MEMBERSHIP HAS ITS BENEFITS: BIG-TIME SUMMIT 2021 SAVINGS

National Comfort Institute (NCI) has many benefits that immediately and positively impact your bottom line.

For example, NCI members get the best rates for attending the **High-Performance HVAC Summit** event in Branson, MO, from August 30 to September 2.

Plus, members have the advantage of being able to use earned NCI Training Bucks to help offset the cost of attending Summit.



NCI wants to make it easy for members to bring their entire team to this year's event. In that endeavor, if you bring three or more people, you will qualify for the biggest discounts ever.

Some members have already signed up their entire team for free using their Bucks. So don't wait. Learn more about the bonus discounts and NCI Bucks you can earn here at gotosummit.com (click on the pricing options tab). Be sure to **Register Today!**

If you have any questions, call the NCI Customer Care line at 800-633-7058.

MORE MEMBERSHIP BENEFITS: THE MONTHLY POWERPACK

NCI's website is stuffed to the gills with content ready for you to log in and make use of. There is content for every member's skill level.

One great advantage is that each month, every member has access to the **PowerPack**, which provides you links to articles, downloads, webinars, and more.



In that light, the July 2021 PowerPack is ready. Here is what you get:

- **Top 10 HVAC Performance Based Sales Obstacles (Download)**
- **An Air Side Diagnostics Lesson (Download)**
- **CO Levels and Risk Chart (Download)**
- **HVAC for Rookies (Online Training Modules)**
- **Master HVAC Pressure Diagnostics with NCI Static Pressure Budgets (Webinar).**

Be sure to share the July PowerPack with your entire team. Just go to: ncilink.com/PwrPak.

If you have any questions, or if you are unable to access any of the tools in this program, please contact your Customer Care team at 800-633-7058.

ARE YOU GETTING ALL YOUR BENEFITS?

NCI Bucks is part of the NCI **Member Rewards Training Incentive Partner Program** or TIPP for short.

As members, you can earn incentive rebate dollars from our industry partners for purchases you make.

All rebates you earn are deposited into your training account in the form

of what we call, "NCI Bucks." You can use these funds to pay for any live NCI training class, online training, or conference.

You can also use a portion of your NCI Bucks for tool and instrument purchases on the NCI website (nationalcomfortinstitute.com),

In the last 12 months, NCI members have earned a total of \$400,000 in NCI Training Bucks.

So, are you getting your fair share?

To take advantage of this program, you need to register with our partners. Click ncilink.com/Partners to see our partners and click on each one to see how you can sign up and start earning Bucks right away.



By the way, NCI training bucks never expire. They carry over from year-to-year with no penalties or loss in value. As a member, NCI Bucks can reduce or even eliminate your training costs and are a key benefit of your membership.

For more information on TIPP, go to ncilink.com/TIPP. For more information on how to redeem your bucks and what you can use them for, go to ncilink.com/bucks.

If you have any questions or need help regarding your bucks accounts, call 800-633-7058 and ask for a Customer Care representative.



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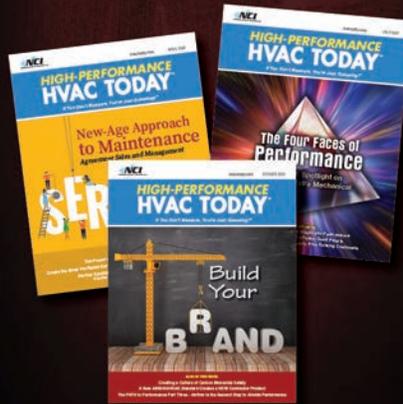


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Advertiser Index

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Baker Distributing Company www.BakerDist.com	28
Duct Saddles www.DuctSaddles.com	11
Goodman Manufacturing www.GoodmanMfg.com	29
Lazco Corp. www.LazcoCorp.com	5
Pearl Certification www.pearlcertification.com/contractors	25
R.E. Michel Company www.REMichel.com	8
The New Flat Rate www.TheNewFlatRate.com	28
To Your Success www.ToYourSuccess.com	28
United Refrigeration www.uri.com	25

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

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Don't Be a Frog in Hot Water!



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Over the past year, as the world's reaction to the COVID Pandemic evolved (or devolved), I noticed a slow but steady decrease in customer service across many of the industries I interface with.

This reminds me of the story about putting a frog in a pot of cold water and raising the temperature one degree at a time. Before the frog realizes it, without even trying to jump out, it is cooked!

Now the frog is NOT the customer. Believe me, they also notice that many businesses are not treating them very well. Most people I talk to have encountered increasing rudeness and poor attitude. Plus they feel businesses make more mistakes than before as many employees don't seem to care that much.

The frogs in this story are businesses that are becoming lax, not monitoring what employees say or do with regard to customer care. This of course isn't true with all businesses. In fact, those that purposely make sure their service is more stellar than ever shine bright among the many companies whose light seems to have gone out.

"Frog" companies seem to just be going through the motions, and in some cases treat customer interactions more as nuisances than opportunities to win customers for life.

I believe one reason for lackluster customer service is the movement from working in an office environment, where people are more accountable for their actions, to a work-at-home environment where things can easily become a little too relaxed.

I've personally experienced annoying interactions with support personnel and salespeople working from home where they seem to almost be bothered by answering the phone. Conversations are often interrupted by children playing, dogs barking, the UPS guy at the door and so forth.

What's worse is they usually don't apologize for

the disruption. They assume you understand since everyone is working from home.

Since when is it the customer's job to be understanding? Shouldn't it be the other way around? In the past year I could probably identify at least 15 or 20 such annoying interactions. And if I can, I'm sure if you think about it, you can too.

AN OPPORTUNITY

This creates an opportunity for our industry and your company. Kick things up a notch by making sure your people haven't fallen into the frog syndrome. Make sure they deliver excellence in everything they do and your company will stand out.

In fact, we should all see this decline as a chance to take a hard look at our organizations. Has frog syndrome crept into your business, one degree at a time? Take a step back and look at how your employees interact with customers on the phone and in person. Is it time to initiate new customer service training?

The other day I heard someone use the term "Pandemic Fog," comparing it to a "fog of war" feeling. Many have experienced a sort of memory lapse on how we did things prior to the pandemic.

At NCI, as we return to in-person training, our team is dusting off and relearning how we did things before the pandemic. It's been an eye-opening experience!

Even though most HVAC contracting businesses continued working throughout the pandemic, it still might be worth taking time to evaluate and give your team a customer service tune-up. This way you can make sure they're providing the best possible customer experience.

Such a "tune-up" will be an investment well made, and without a doubt will make you a stand-out in your marketplace during these changing and uncertain times. 

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



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August 10-12: 8am-5pm ET (Chicago, IL)
August 17-19: 8am-5pm ET (Minneapolis, MN)
August 24-26: 8am-5pm MT (Salt Lake City, UT)

Performance-Based Selling Bootcamp

August 17-19: 8am-5pm ET (Cleveland, OH)

Residential HVAC System Performance & Air Balancing Certification Program

August 24-26: 8am-5pm MT (Denver, CO)

To Register: ncilink.com/ClassSchedule
or Call 800-633-7058

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Grow Profitably with Airflow Upgrades***

2-hr training program
(SCE) September 8: 8am-10am PT

IN-PERSON TRAINING

Commercial Systems Performance***

August 3-4: 8am-5pm PT (Los Alamitos, CA)

Optimize Economizer Performance with Certification***

August 24-25: 8am-5pm PT (Los Alamitos, CA)

Refrigerant-Side Performance Certification Program

September 1-2: 8am-5pm PT (Los Alamitos, CA)

To Register: ncilink.com/scereg
or Call 800-633-7058



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