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- Pricing Profitable Air Upgrades and Duct Renovations
- Proper Residential System Design
- Build Craftsmen, Not Laborers



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# Five Ways Your High-Performance Business Can SOAR Above Your Competition



**Mike Weil** is editor-in-chief and director of communications and publications at National Comfort Institute, Inc. Contact him at [ncilink.com/ContactMe](https://ncilink.com/ContactMe).

In his article on pricing air upgrades and duct renovations ([ncilink.com/Holt](https://ncilink.com/Holt)), David Holt asks, “Aren’t you a high-performance HVAC contractor? Haven’t you heavily invested in the tools and training required to be a craftsman in this trade? As a result of these investments, aren’t you worth more than *low-bid Larry*?”

Of course, you are! In many instances, being worth more, and being able to prove you are, puts your business at an advantage to soar above everyone else in your marketplace.

In my mind, you **SOAR** above competitors because of your **Situation** as a High-Performance HVAC contracting firm and because of the **Opportunities** you have by investing in the right way to do business. This enables you to take **Action** by listening to your customers, and by innovating to solve problems that others don’t know how to find. Your **Results** are satisfied customers who provide you repeat business and fantastic leads.

OUTPERFORM EXPECTATIONS AND DELIVER VALUE TO CUSTOMERS LIKE FEW OTHERS CAN.

## FIVE WAYS TO BEAT YOUR COMPETITORS


To SOAR in your marketplace, consider these five ideas:

- **Find Customer Pain Points.** They all have them. Your job is to find and fix them. You do that by discussing issues they are experiencing, then testing and measuring the system to find out what is going on. Cost is a pain point too, so give them several options to help with their budgets. And don’t forget financing!
- **Tell Your Story.** High-performance HVAC contracting isn’t easy. If it was, everyone would be doing it. But you have to be able to

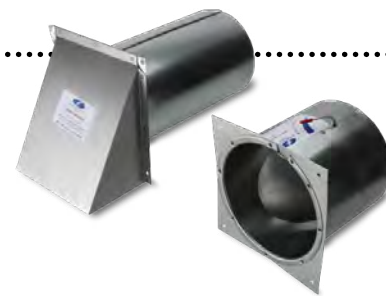
tell customers what that means and how it benefits them. Telling your story means being clear in your messaging. It also means reinforcing your brand. Your story should be in terms customers can understand so they can make the best decisions and feel good about their purchases.

- **Provide Great Customer Service.** You have to deliver on your promises and prove that you delivered every single day. Doing this sets up an interesting situation where you aren’t actually competing against someone else. If you think about it, your only competition is to become better than you were the previous day.
- **Innovate and Grow Your Company.** To beat your yesterday self is to continually improve. By doing this, it almost doesn’t matter what your perceived competition is doing. Implementing a high-performance approach is a strong way to innovate, command higher prices, and grow your team and your business.
- **Provide More Value than Expected.** High-Performance HVAC contractors focus on providing a product with proven performance accomplished through testing, measuring, diagnosing, and correcting customer comfort and energy issues. You outperform expectations by making air visible and finding solutions to issues that few other contractors even know about. Talk about value!

Value is also seen in how energized your team is. Customers can see that. You can energize your team with trust, professional development, collaboration, and the opportunity to take ownership of their work.

All of these things combined can help you SOAR above competitors and truly distinguish your company in your marketplace. 





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problem. Furthermore, uncontrolled infiltration and exfiltration can negatively impact vented equipment such as furnaces, water heaters, boilers etc.

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To learn more about the **Field Controls MAS-1 Make-up Air System**, go to [ncilink.com/MAS1](http://ncilink.com/MAS1). **NCI**

— By Jim Davis, senior instructor, National Comfort Institute

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# Bringing Integrity Back to the Commercial TAB World

Integrity Test and Balance, Inc. is a 20-year-old specialized contracting firm that commissions HVAC systems to ensure they deliver what they are designed to deliver. Kevin Heikkila's testing, adjusting, and balancing company (TAB) is headquartered in Traverse City, MI, and serves the commercial HVAC marketplace.

TAB specialists perform air and hydronic measurements on HVAC systems, then adjust air or water flows as needed to achieve optimum performance of the mechanical equipment.

Typically, the TAB specialist submits a written report summarizing the tests and measurements, any adjustments made, and the balancing results to the mechanical engineer or

building owner. These reports often contain notes on any issues or deficiencies found. Often the facility managers will then use the TAB report to hold their designers or mechanical engineers accountable.

Heikkila says he is often asked to come in BEFORE any work is done to find any pre-existing conditions.

"In our area of Michigan," Heikkila says, "many buildings do not operate to spec because corners are cut during the construction or renovation to save time and dollars. The results are buildings that use too much energy, are uncomfortable, and sometimes even dangerous."

Heikkila, who says he has been involved in the HVAC Industry since graduating high school in 1975, has seen many of these issues.

"I decided to launch my own TAB company because of this situation and all the dishonesty that seemed prevalent in the Western Michigan marketplace. That is why I named the company Integrity TAB."

But he says the name isn't enough. You have to prove your integrity every single day.

## THE COMPANY TODAY

Integrity TAB came to life in January 2002 with a \$50,000 bank loan and one truck.

Testing a giant air louver intake at the Turtle Creek Casino in Williamsburg, MI

Today the company is a small commercial enterprise with five technicians that cleared \$600,000 in 2021. According to Heikkila, the company is small on purpose, so they can focus on being flexible and doing everything right for clients.

Their focus is 60% in the commercial air conditioning market and 40% on hydronics work. The company operates mainly in Northwestern Lower Michigan.

"Our level of work may make us the most expensive TAB company in our region," he says. "That is because we put so much time and effort into each project."

"We typically see specifications calling for a TAB submittal/plan to be composed and provided to the design team before work takes place. This pre-submittal is where we point out missing information, design issues, and any lack of air and water balancing devices indicated on the prints," Heikkila explains.

"Our experience is that very few of our competitors provide a TAB pre-submittal. This is an example of how we meet and exceed the expectations of our customers. It illustrates that we are all-in to make the project a success with the owners approval."



Kevin Heikkila, Integrity Test & Balance





“When we submit our final TAB reports, we include proper descriptions, measurements, missing components, everything. For Integrity TAB, that is just how we do it. Yes, it takes time. But the customer deserves that time so they can decide what to do next.

“We use these reports to flush out all the design issues we see and highlight them. We write notes on our first page outlining the number of issues we found.”

### WHY TRAINING IS SO IMPORTANT

Integrity TAB – a non-union company – cannot do what they do without the best training. Heikkila says he wants his team to operate at the highest professional level possible. “I want them to be confident and know what to do.”

To accomplish that, he uses a lot of on-the-job (OTJ) training to show technicians precisely what he wants them to do.

In the old days, that meant the techs worked alongside him for three years so they could have all the onsite experience to qualify for and take the National Balancing Council exam.

“This exam is one of the only ones out there that stress the importance of the report. They would know how to put together accurate TAB reports for submission to the customer,” he explains.

“I know how important it is to stay ahead of the curve and better ourselves to serve our customers better. I want to continue to be recognized as a leader in the TAB industry in Western Michigan.”

### THE TRUST FACTOR

At Integrity TAB, Heikkila says that though they are a small company,

they are blessed to have good people. “That is a key factor to the success of any company. I see how hard it is for other contractors to find good people who show up on time each day,” he adds.

“But attracting and keeping good people doesn’t just happen. You have to work hard at that. You must build trust with your team, customers, and community.”

He calls that the “Trust Factor.” Such internal trust is vital to the operation of the company. For example, Heikkila says once they are trained and certified and prove they know what they are doing, he trusts his techs to do their jobs.

In the beginning, that trust was given but verified. Today, because of the Integrity TAB team’s years on the job, the techs verify the work amongst themselves.

Another example has to do with the daily work schedule.

“I don’t stipulate my team’s work schedule. They have projects and know the deadlines. For me, this is a trust thing. We have a common goal as a team: to be the best at what we do. So, if half the crew doesn’t start until noon because they’re always working late, I am fine with that. They run their own work and still get all the work done.”

As a team, they talk about projects and decide who will be the leader of each one.

“Then they take it and run with it. I don’t have to look over their shoulders,” Heikkila says.



Kevin Heikkila (right) poses for a picture with National Comfort Institute President Rob Falke (left) during a training session.

This kind of trust, according to Heikkila, is important on many levels. It gives the Integrity team freedom to be creative and thorough.

“Don’t get me wrong,” Heikkila says. “I am still the point man and make sure everything is covered. I stay on top of every project and communicate with the team via email because everyone is busy.”

### PARTNERING WORKS

Because they focus on testing, adjusting, and balancing systems, Heikkila says they do some minor duct renovations to bring a system into balance. Typically that can be installing a volume damper where it was missed by the sheet metal contractor. When more involved physical work is necessary, Integrity partners with others to get it done.

They partner with a great sheet metal contractor and work with the original mechanical contractors to get things corrected. He says Integrity TAB also works with some manufacturers, especially Johnson Controls and Trane.

“Both of those companies are outstanding when it comes to building controls, and they have some of the best engineers working for them,”



Integrity Test and Balance, Inc. sets up to do a building performance test on a church facility.

he explains. He proudly shares that he cut his teeth in this industry with Johnson Controls back when building controls were pneumatic.

“When designing a pneumatic control system, the engineer must understand every control function, every piece of logic, and how they interact to create different sequences. That forced them to think about a system, how it is sequenced, and how the overall building works. That is how his team operates today.

He adds that Trane is also a partner and hires Integrity to commission systems on their projects.

## THE KEY TO EVERYTHING: MAKE IT WORK

Finally, one other key success factor is Integrity’s approach to sales. Heikkila says his sales training and experience also came from the 12 years he worked with Johnson Controls. Their strong belief in continuous training stretched beyond technical work and included sales.

“They taught us how to listen to customers, how to talk to them, and how to ask questions. I learned how to ask open-ended questions and when to ask close-ended questions.

“One of the key success factors I learned at Johnson that I carry even today is that we are all in this together.

“My mentor at Johnson Controls always emphasized the importance of making every job work as best as possible. If the engineer isn’t right about something, fix it within reason. Make it right, so the customer’s system works how it’s supposed to, without any warranty call backs,” Heikkila continues.

“Therefore, I always ask for the mechanical drawings before they go out to bid. We ask the engineers and designers to let us review those drawings and then mark them up for corrections to show where balancing devices should be added.

“We do that on every job. Some of our largest medical facility customers LOVE that. The idea is to fix it on paper, so it works in the field. It’s about

team and cooperation. We are all in this together. Everyone wins.”

## BRING INTEGRITY BACK TO TAB

Heikkila says knowledge is the secret weapon to help you help your customers.

“Knowledge will bring you business. It helps create your success. So be tenacious in your efforts and don’t hesitate to call someone when you have a question. That is how you build relationships and increase your knowledge about your partners, customers, business, and projects. Those relationships help build trust, and we all know how important that is. By the way, all of that brings integrity back to the TAB trade.



“And remember. It’s better to do an installation job once by ensuring everything is as right as it can be in the drawings. All of this requires training – the knowledge, sales, and the way to communicate,” Heikkila concludes.

For these and so many other reasons, **High-Performance HVAC Today** selected the team at **Integrity Test and Balance, Inc.** as this month’s **Contractor Spotlight**. Congratulations to Kevin and his entire team.



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# What it Takes to Do Proper Residential System Design

I receive many calls from contractors who ask me about the verifying aspects of a comfort system design. Their questions sometimes put me in a position to analyze a non-performing system.

Here are some insights on how we do home system design and installation that have worked for us for over 50 years.

From a design standpoint, **Tetra Mechanical** doesn't have an on-staff Professional Engineer (PE) or work with a third party. I have a degree in engineering focused on HVAC and a degree in electronic engineering, along with 120,000 hours of HVACR field experience.

I oversee all our designs, and our vice president of construction runs the installation side of the business. He also understands most aspects of design. He will check with me and I with him,

two sets of eyes helps reduce errors. So, which of us designs our duct systems depends on time and availability.

There are several ways to lower your cost. If you're not comfortable designing a system, you can look for an engineer to help with some of the load calcs or design. Just ask the engineer how the two of you can make it work.

## KEY CONSIDERATIONS ON RESIDENTIAL SYSTEM DESIGN

When designing a High-Performance HVAC system, we consider several key issues: house design, space for ducting, Indoor Air Quality (IAQ), proper equipment sizing, and other areas often overlooked, such as exhaust fan fenestration and more.

IAQ has become more important than ever, but so has its cost, and if you have taken NCI's **Duct Optimization Class**, you know all too well that IAQ is like a dam holding back the water! The client is the throttle on the system. What I mean is they set the budget, then pick the accessories and equipment quality.

We also think about how our duct designs translate to field conditions when installing it. Is it better to have three or four smaller ducts for return air rather than one large, restricted duct? What about crush factors because of space issues in framing?

We also have bare minimums because some of our systems come with a 12-year or lifetime warranty. Warranties like this mean you need to install the system properly. The owner must purchase certain parts of the design, like all new sheet metal ducting, new refrigeration line size, and so on.

In our area, the government mandates that





we use Low NOx heaters. These heaters have flame temperatures that exceed 2800°F. Airflow is key to keeping the unit running. Therefore ductwork must be on point.

## WHERE TO START?

Here at Tetra Mechanical, our design strategy begins during the sales call. Our service technicians test, measure, and collect as much data as possible. Data includes pictures, system measurements, and whether the system is a planned replacement. We then use National Comfort Institute's (NCI) **ComfortMaxx™** or **AirMaxx™** software to understand how the ducting is performing and what the equipment Btus are.

We look at the ducting situation in all rooms, grill types and sizes, exhaust fans with total cfm, insulation, fenestration type and size, and the electrical panel. We also include any equipment model numbers. Other data includes whether the equipment uses propane, natural gas, or electricity for heating.

Don't forget to include the exhaust fans. Those fans remove air. That air must be made up. It can be pulled from ceiling light fixtures, the flue in the chimney, the furnace, or the water heater. The tighter the home, the more prevalent it becomes. Consider that you're building a potential health problem. I have fixed dozens of systems with this issue.

Once we have all that information, our sales team gets the homeowner involved by discussing dust issues, noise problems, comfort level expectations, and power consumption concerns. **NCI's sales class** with David Holt helped us in this area.

For example, we have one client

who wants his home temperature set at 63°F during sleeping hours (5 am to 12:30 pm), which means that system needs to be custom designed and built. Custom design is what Tetra is all about.

When laying out the duct system, we use a program called **Bluebeam Revu**, which allows us to do overlays or just about anything else. For a quick snapshot, we use **EDS HVAC Load Calculation** software to give insight into what a load calculation would look like for the home. Then we select equipment and accessories based on the customers' desires.

## TRAINING MAKES OUR WORK BETTER

Because we regularly train with National Comfort Institute (NCI), I believe it is hard to do an installation wrong. Because of NCI's duct renovation and system performance training, we know **NOT** to take shortcuts!

However, sometimes there are no options, and you face doing something that's not optimal. That is when we know we are going above and beyond because our belief is to do everything possible to find a proper solution.

We try to have everything laid out and planned. It's tough fighting the box swappers who low-ball prices and take shortcuts. I see and get paid to fix the problem after those box swappers come and go.

Once, I was asked to go into a home that had seven total HVAC systems. They shined like new pennies! Two did not cool at all; their compressors were damaged. The reason was poor

duct design. All the other equipment had furnace troubles, and one had a fan literally coming apart.

Within an hour of sending in my report, I found myself talking to someone's lawyer. Shortcuts don't do your reputation any good, nor are they good for the equipment or the power grid.

Lord Kelvin once said, "*if you cannot measure it, you can not improve it.*" He also said, "*...when you can measure what you are speaking about, and express it in numbers, you know something about it; but when you cannot measure it, when you cannot express it in numbers, your knowledge is of a meagre and unsatisfactory kind.*"

I had the numbers; I did the math as Lord Kelvin taught. So when I spoke, I knew I was 100% correct.

We stay out of defense mode by being honest and showing customers all their options based on science and measurements. We show them the test results from AirMaxx or ComfortMaxx. That goes a long way, especially after you practice explaining it two or three dozen times to your dog or whoever will listen. **NCI**



**Kent Donnelly** owns Tetra Mechanical, a \$3.5 million HVAC contracting firm in Simi Valley, CA. This High-Performance HVAC contracting firm serves both commercial and residential air

conditioning markets. If you'd like to learn more about Kent and his company, read their Contractor Spotlight here: [ncilink.com/tetra](http://ncilink.com/tetra). Questions? You can reach out to him at [ncilink.com/ContactMe](http://ncilink.com/ContactMe).



# It's All About Your Success.

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Hundreds of Technical & Marketing Downloads	✓	✓	✓
Members-Only Newsletter	✓	✓	✓
Article Library Featuring Technical & Business Articles	✓	✓	✓
Live & Online Training and Conference Discounts	✓	✓	✓
Member Rewards NCI Training Bucks on Purchases	<b>15%</b>	<b>15%</b>	<b>5%</b>
Training Incentive Partner Program (TIPP) Dollars	<b>Maximum</b>	<b>Maximum</b>	✓
NCI Online Store Discounts	✓	✓	✓
ComfortMaxx Air™ - Airflow Testing Software	✓	✓	✓
Unlimited Online University Courses	✓	✓	
Unlimited Webinar Access	✓	✓	
Bonus Annual NCI Training Bucks Earned	<b>\$4200</b>	<b>\$1200</b>	
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# Build Craftsmen, Not Laborers

**C**raftsmanship is a skill in a particular craft that creates something elegant and high-quality. It delivers a lot of value and, within the HVAC industry, a lot of performance. Being craftsmen helps our company, Lakeside Service, build better systems, and to be better in-home service professionals.

The transition didn't just happen. In fact, it took five to 10 years to get to where we are today, and I don't know if we will ever truly finish. We first discovered the high-performance approach to HVAC almost two decades ago. At the time, we had no idea where that first airflow class was going to lead us.

Looking back at the road to implementing high performance into our business, we learned many lessons. One that really stuck was we had to build our technicians into craftsmen, not just laborers who punch a clock.

## CRAFTSMANSHIP BEGINS WITH TRAINING

Everything starts with training. In 2004, I attended my first NCI airflow class. Shortly after that, we got into performance-based training, but not at a companywide level. I would go to classes with a few of our techs to learn what we didn't know. We believed this training was the way to go, but we lacked a plan to implement it on a company-wide scale.

As a company, we always

NCI's David Richardson teaching one of Lakeside Service's onsite classes.

wanted to be the best we could be. So after taking the classes, I realized Lakeside was missing an important design and installation perspective. Airflow is the foundation of diagnostics, not a supplement. There was so much more we could accomplish through testing and measuring static pressures, doing combustion analysis, and even more that wasn't in our heads yet. I wanted to do it all at once, but that was easier to dream than it was to implement.

So, I became the guinea pig. I'd take the classes and then use what I learned in the field. As I gained experience, we expanded to have a few of our top techs who understood static pressure practice it in the field. I personally gained a lot of experience and skill. However, we just didn't seem to get the traction to make this our business model.

An unfortunate result is that we created an unintended technician mindset where high performance was for specialists only. Worse, the techs felt it didn't need to be done every time. Half the guys didn't understand what we were doing or why we were doing it.

This division became a real leadership challenge when we reached almost 20 techs but only four or five were certified. Imagine coaching a team and only letting the best players learn and practice the plays. How do you think they would perform together on the field? It doesn't make much sense when I look back on it now, but my hindsight has always been better than my actual vision.

## A DIFFERENT APPROACH

So, after almost a decade, we changed course in 2012 by doing a National Comfort Institute (NCI) onsite training session for the entire team. Onsite training is where the NCI instructor comes to your





business and conducts the exact training they do all across the country. The difference: only your team attends.

Now it seems so obvious. We had hired consultants multiple times over the years to come in and teach management about the business side of things. Why didn't we take this on-site, all hands on deck approach earlier?

I suppose partly because Lakeside never invested in this level of technician training, and I'm sure there were concerns about the cost. It certainly wasn't part of any long-term plan the first time we did it. We just knew that we needed to do something different.

It didn't take long to realize our techs LOVED it. Because of our on-site training, we now have all of our technicians certified. Everyone knows how to do static pressure testing and some air-side diagnostics, not just the privileged few.

## CREATING PROCESSES

We soon realized that if we didn't change our internal processes and

Lakeside Service uses this data collection form - a digital, fillable, PDF - that is built into their Service Titan management software.

didn't include our air diagnostics service on our documents, forms, and daily routines, high-performance testing would never get fully implemented.

Even after the onsite training, we still had techs who weren't comfortable testing. Plus, there was the issue regarding which tools and instruments to use.

I think we had some unrealistic expectations at first. We assumed that once trained, technicians could hop in their truck and start using the knowledge. We found that might work for a few of them, but to really get everyone onboard a little planning went a long way.

We knew craftsmen need proper tools for the job, so our first goal was to figure out what those tools should be. Right off the bat, the team needed manometers. We settled on something simple that everyone could afford. It was digital, and we made sure that each tech had one.

The next step was to focus on things we could control the most. We started to document static pressure on every maintenance call.

Once that became routine, we added static pressure testing to every installation startup. And just to give some perspective, the amount of time from the first on-site training to every installation was probably two to three years.

## DATA COLLECTION AND ANALYSIS

With the guys finally doing regular testing, we needed to gather that data for analysis. We decided the smartest and quickest way was to use the NCI **HeatMaxx™** and **CoolMaxx™** forms. Because almost none of our techs had tablets at that time, we opted

out of using apps and other software. We filled out those forms on every maintenance call and anytime there was an issue.

I loved those forms! They were easy to use and let us record our measurements and make carbon copies so we could leave one with the customer.

It was a few years into testing before we customized our forms to fit our needs. Even then, they were a combination of data recommended by equipment manufacturers and the data points on the NCI forms.

Today, we use a digital fillable PDF that we built into our **Service Titan** service management system.

Whichever way you decide to record the data, the important thing is that someone makes sure the testing is done, recorded, and verified on every invoice. It takes time and energy, but it needs to be done.

## FIRST BUILDING PERFORMANCE. THEN HIGH PERFORMANCE

Going back before testing was company wide, near the end of 2009, my father had encouraged me to get Building Performance Institute (BPI) trained and certified. Once I completed that training, I added energy audits to my sales responsibilities. I sure learned a lot and we improved a lot of houses, but without combining static pressure testing or airflow to the process, I was missing the big picture. It wasn't long before I realized we were overlooking the ductwork.

As a home energy tester/auditor, I could help customers achieve Energy Star specifications, but addressing the building envelope without the duct system wasn't solving any real issues.

I think every NCI member knows if





you don't work on the heating and cooling systems, other major appliances, **and** ductwork, there is no way to achieve significant energy savings. Why? Because the HVAC system consumes over 60% of the energy in a typical home.

So, we used the HeatMaxx and CoolMaxx forms in combination with our BPI processes while participating in the **Home Performance with Energy Star** program from 2010 to 2014. We would use the program software to rate the building envelope, and the NCI forms to see the other side of the performance story by rating installed HVAC system efficiency.

The turning point in Home Performance occurred when our energy audits led to us selling duct renovation jobs that began making Lakeside real money.

When Lakeside was busy, we sold duct renovations and then scheduled work for the off-season. That leveled out our labor and ultimately led to keeping the field team busy all year. We saw our tech turnover drop significantly. That was a huge win.

## LEADING THE WAY

Once our management team saw the economic advantages of airflow diagnostics and duct renovation, they began focusing on building a culture of craftsmanship.

Now our technicians could truly excel at solving customers' comfort and energy issues. This also opened our minds to investing in that first on-site training in 2012. To quote the late great John Garofalo, "*The juice was worth the squeeze.*"

Our leadership set expectations and implemented testing and diagnostics

into our daily routines, adding testing to all maintenance, service, and installation procedures. At this point we experienced so much positive feedback that we budgeted for at least one NCI onsite per year.

One of the most significant rewards for me was being able to listen to customers share what our techs did that directly affected their comfort, and how no other contractor ever talked about these things.

From our techs' viewpoint, especially the younger guys right out of school, we were doing things they never learned. For example, no one else was leaving a tune-up or maintenance report with customers. They are doing next-level work, and that was something cool that changed their perspectives. It built excitement in their careers.

The high-performance approach has helped us instill a level of pride that comes with working at Lakeside. It enables our team to create something elegant and high-quality that delivers a lot of value to our customers. And that is something that anyone can go home feeling good about.

## SELLING YOUR VALUE

You deserve to be paid for what you do. High-Performance contracting is for those who want to be the best. Craftsmanship is elite contractor stuff. It's not the same as running service calls to make a buck.

Be sure to let your team know this when you talk to them. Don't just say it, make them feel it. Use how you connect with your team on a personal level, and let them feel the pride

that should come with performing this level of service. When they feel and express this in their work, the customers who always complain about price seem to disappear.

At Lakeside, we believe you cannot leave testing, measuring, and structured diagnostics out of the equation and solve the real problem. The question is, how do you get your team to sell this for its value? It comes down to your ability to communicate with your team effectively.

John Garofalo often told me "leaders are not born, they are made." Every leader's ability to motivate boils down to trust, and trust is earned through consistent action. The consistency of someone's actions equals their integrity.

Our craftsman approach was born from the intention to be the best we could be. The unintended result is our culture today helps us win awards and build confidence. It makes Lakeside an attractive employer for young people who like our 'cool factor.'

Success requires our leadership to create a craftsmanship culture with buy-in and passion from the top down. So that is how Lakeside Service crafted our High-Performance HVAC culture and changed our business. **NCI**



**John Boylan** is the general manager of Lakeside Service Company in Brighton, MI. The company specializes in designing, engineering, and installing complete comfort systems in new and existing homes. To

contact John, go to [ncilink.com/ContactMe](http://ncilink.com/ContactMe).





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# Pricing Profitable Air Upgrades and Duct Renovations

**W**hen pricing high-performance air upgrades and duct system renovations, you must focus more on the lifetime value delivered to the customer, 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 custom-built solutions.

The recipe for success when pricing these important products includes three main ingredients: Mindset, Toolset, and Skillset.

You may be thinking, “yeah, I’ve heard that message before, so I can just skip this article.” Not so fast! Read on for a fresh perspective on proper pricing strategies for these valuable products that only your team can deliver. The juice will definitely be worth the squeeze.

## PROFITABLE PRICING BEGINS WITH THE PROPER MINDSET

In his article entitled, “What Are You Worth?” ([ncilink.com/Worth](http://ncilink.com/Worth)), Matt Michel wrote:

*“Fail to charge enough and you tell the world you aren’t worth much. Worse, you tell your customers you aren’t worth much.*

*“Even worse, you tell your employees you aren’t worth much. Worst of all, you tell yourself you aren’t worth much. That’s a horrible message to send.”*

So, what are YOU worth?

Aren’t you a high-performance HVAC contractor? Haven’t you heavily invested in the tools and training required to be a craftsman in this trade? As a result of these investments, aren’t you worth

more than “low-bid Larry”, the guy who just replaces equipment without ensuring that the entire HVAC system is operating as it should?

Of course, you are!

## A LOW-BID MENTALITY HOLDS EVERYONE BACK

This low-bid attitude has everyone in the industry fighting for survival and puts the entire industry in a scarcity mindset. It forces you to focus on **immediate gratification** (closing a sale right now, even when they aren’t profitable jobs) and **short-term problem solving** (fixing immediate problems without considering long-term safety, health, comfort, and efficiency impacts).

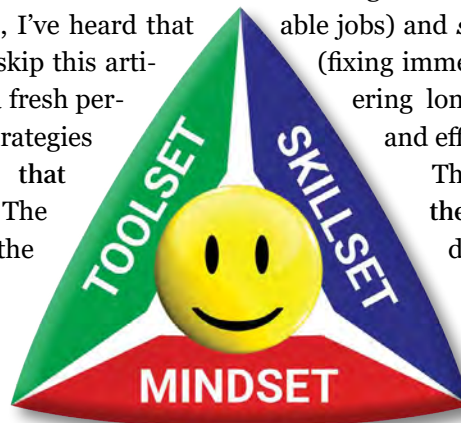
The low-bid mindset perpetuates the false perception that this is a dog-eat-dog industry operating from an “us-versus-them” mentality. This price-based competitive tactic continues the narrative that the HVAC industry is tough and toxic,

and everyone is scraping the barrel just to get by. It doesn’t have to be that way.

## DO YOU BELIEVE THE HIGH-PERFORMANCE HVAC APPROACH IS WORTH IT?

If you don’t believe you are worth more, how do you expect anyone else to pay you more? High-Performance HVAC professionals **are** worth more, but only you can demonstrate that to your team and your marketplace.

If that little voice in your head keeps saying “everybody in my market only buys the low-bid option,” you need to change your mind! That “little voice” is a liar and needs to be exposed to the





truth that, *believe it or not*, **most** buyers DO NOT have a low-bid mentality.

Sure, building contractors and property managers have a low-bid mindset, but Mr. & Mrs. Smith on Elm Street are customers who literally live with their HVAC decisions. They are willing to invest more to enjoy the safety, health, comfort, and energy efficiency benefits that you offer. Those low-bid building contractors and property managers don't really care about that – they just want to keep initial costs down.

### THE RIGHT TOOLS FOR THE JOB

Multiple studies prove that the **Pareto principle** (the 80/20 rule – roughly 80% of consequences come from 20% of causes) also applies to pricing strategies. When using a well-crafted Good-Better-Best approach, experience demonstrates:

- 10% of buyers select the “good” option (lowest initial cost, minimum performance)
- 80% of buyers choose the “better” option (higher initial cost, improved performance)
- 10% of buyers invest in the “best” option (highest initial cost, ultimate performance).

That means that 90% of buyers choose based on the perceived value of the contractor's qualifications, experience, processes, past results, recommendations, reputation, and performance benefits of the offer, NOT lowest price. That's good news for high-performance HVAC contractors like you! You must focus on high-performance value, not lowest price.

### THE POWER OF CHOICE

You must change YOUR mind about your pricing methods because most

of your customers are already primed for performance-based decisions. Customers have difficulty determining the true value of your offer unless they have something to compare it with. When you only offer one price, they are psychologically compelled to compare it to another contractor's price.

When you offer multiple options, customers can easily compare the prices and decide based on their perceived value of each offer. This can eliminate getting other bids because you have satisfied their psychological need to comparison shop. When you make it easy for them to comparison shop, you win more jobs.

The good-better-best pricing approach is a tool that has satisfied the psychological need for comparison shopping for decades. The strategy is simple. Charge a little, deliver a little. Charge a little more, deliver a little more. Charge a lot more, deliver a lot more. What could be easier?

We used this pricing method at my Dad's HVAC business. In 1998 (the last full year we owned the company) our average sale price was \$7,600 while our typical competitor was hovering around \$3,500. Offering a menu of choices with increasing value in each option really works!

### PROPER PRICING MAKES MANY PROBLEMS SOLVABLE

In Michel's article, he stated “*Proper pricing will not solve all problems, but it will make many problems solvable.*” He is 100% correct. When you sell jobs at the “right” price, you will have the money to hire and train the right people; you can equip them with the right tools and instruments; you can stand behind your work; you can

build a business that works, so you don't just have a job.

In the customer's mind, your price defines your product. Everyone knows you get what you pay for. Customers want and deserve great products. By offering and delivering great solutions that solve customers' short- and long-term problems, you earn the great rewards that you deserve.

Think about it — can you fix dust problems, uncomfortable rooms, pressure imbalances, and other common customer complaints by simply changing out the condenser, evaporator, and furnace? Of course not! Resolving those problems requires more tools, training, products, and services. Solving more problems means more money must be invested. Isn't this easy?

### HIGH-PERFORMANCE HVAC IS NOT A COMMODITY

Let's face it... HVAC equipment is a commodity item. Almost all units produced in our industry are assembled using components manufactured by Copeland, ICM, Fasco, Honeywell, Emerson, and so on. They are almost identical to each other in many ways. That's what makes them a commodity.

The High-Performance HVAC approach is unique. You must use advanced diagnostics skills; determine the real problem using the right tools; understandably communicate truthful findings and recommendations; price the solutions appropriately; solve the customer's problems; and stand by your end-product. That is a real specialty, not a basic commodity.

### EDUCATION IS THE KEY

The key component in the high-



performance approach is your educated people. Without investing in employee education, you're just like the rest of the industry. In a "revolving door" world where employees come and go, many people fear investing in education. Many contractors ask, "what if I train them and they leave?" My question to them is, "what if you don't train them and they stay?"

When my Dad's business got serious about training our people, our employee door quit revolving. We enjoyed better loyalty and our team was more cohesive because everyone was empowered and equipped with the tools and training needed to be successful in the role for which they were being paid.

In addition, we got multiple employment applications from good people who wanted to work for a

JOB SALES PRICE COMPONENTS	DESCRIPTION
DESIRED NET PROFIT	$EST. MAN HOURS \times NPH$
+ OVERHEAD COST	$EST. MAN HOURS \times OCH$
+ DIRECT LABOR COST	$EST. MAN HOURS \times INDIVIDUAL HOURLY WAGE RATE$
+ EQUIPMENT & MATERIAL COST	ACTUAL COST (PLUS SHIPPING & SALES TAX IF PAID WITH PURCHASE)
+ MISCELLANEOUS COST	PERMIT FEES, SUBCONTRACTORS, AND OTHER COSTS
= TOTAL JOB COST	
+ FINANCE COST	$TOTAL JOB COST \times ACTUAL (OR AVERAGE) FINANCE \%$
+ SALES COMMISSION	$(TOTAL JOB COST + FINANCE COST) \times COMMISSION \%$
= JOB SALES PRICE	$TOTAL JOB COST + FINANCE COST + SALES COMMISSION$

FIGURE 1: Net Profit Maximizer equation



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company that genuinely cared about their personal development. It was a big win for all involved, especially our customers. Well-educated team members are not a commodity.

### CUSTOMIZED PRODUCTS NEED CUSTOMIZED PRICING TOOLS

So how do you pay for all this? The answer is simple: the customer pays for everything. If the customer doesn't pay for everything, who does? You and your team do, that's who.

I love my customers but I'm not sure I love them enough to pay for their stuff too... are you?

What if you could price all your jobs in a way that honored the importance of your well-equipped and educated people?

What if all the other direct costs were just passed on to the customer at your cost with NO markup?

Blasphemy, you say? How can that be? Read on my friend...

Developing a plan to cover all your costs and earn a reasonable net profit requires two very important and magical numbers:

**Overhead Cost per Billable Man Hour (OCH)** and **Net Profit per Billable Man Hour (NPH)**.

### CALCULATING OCH AND NPH

Determining your magic numbers is amazingly simple:

- 1. Determine Billable Man Hours.** The key word here is "billable." Make sure you subtract vacation, holiday, sick time, training, meeting, and other non-billable hours from your total available work hours in a typical year.
- 2. Determine Overhead Cost.** From an accurate [Profit & Loss](#)

[statement](#) covering your last 12 months, this number is typically listed as something like "Total Operating Expense" and includes all costs required to keep the doors open (rent, utilities, insurance, vehicles, equipment, etc.)

- 3. Determine Net Profit.** From that same Profit & Loss statement, look at the bottom for the Net Profit dollars you earned during the 12-month period. If you are happy with the number, use it. If you are not happy with the result, increase it to what makes you happier!

- 4. Calculate your magic numbers.** This is the easy part!

- OCH = Overhead Cost divided by Billable Man Hours
- NPH = Net Profit divided by Billable Man Hours.

These two numbers are essential ingredients for this profit-maximiz-

ing job price calculation method. Get them wrong and you can really mess things up. Keep the *Goldilocks Effect* in mind -- not too high, not too low, just right!

**NOTE:** As your Overhead Costs and Net Profit goals change, you must revisit this calculation and adjust accordingly. You don't have to wait for a year-end P&L to adjust your magic numbers!

### FIGURING RETAIL PRICES USING OCH AND NPH

Now that you have your magic numbers in hand, it's time to use them in your new job price formula. Remember, this approach is honoring your non-commodity people power, so estimated labor hours are the key variable. **Figure 1** shows the Net Profit Maximizer Equation.

**Read the rest of this article online; [ncilink.com/holt2](http://ncilink.com/holt2).**

## David Holt Was a Presenter at NCI Summit 2022



This article is based on a presentation given by David Holt at National Comfort Institute's **2022 High-Performance HVAC Summit** in Scottsdale, AZ. The session was titled, "How to Price Profitable Air Upgrades and Duct Renovations."

In this session, David showed High-Performance HVAC contractors why they should consider their work to be high-value craftsmanship that no one else can duplicate. Then he detailed how to price the work accordingly.

If you couldn't attend this year's Summit, this article should give you the key highlights of what David shared with those who were there.

By the way, be sure to mark your calendars for the **2023 Summit which will be held in Branson, MO from April 15-20, 2023.**

**David Holt** is NCI's director of national accounts and an instructor. You can reach him at [ncilink.com/ContactMe](http://ncilink.com/ContactMe) with any questions.







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## HVAC Summit 2023: Mark Your Calendars

National Comfort Institute's in-person High-Performance HVAC Summit 2023 will be held in Branson, MO from April 16 to 20, 2023 at The Chateau on the Lake in Branson, MO ([ncilink.com/Chateau](https://ncilink.com/Chateau)).



Branson is an excellent location and a great place to make Summit a working vacation spot for you and your family. The city is nestled in the heart of the Ozark Mountains in Southwest Missouri and boasts many outdoor activities. Plus, more than 50 theaters and music venues line the main drag known as 76 Country Boulevard within the city.

The Chateau on the Lake is NCI's headquarters hotel. It's located on Table Rock Lake, a short 10-minute ride away from Branson's entertainment district.

**So be sure to mark your calendars for April 16 to 20, 2023**, and plan to stay and play!

Stay tuned here, and remember to check [gotosummit.com](https://gotosummit.com) for more information on the Summit itself, registration, special NCI member pricing, and exceptional hotel packages as it becomes available.

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# Five More Ways to SOAR Above Your Competition



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

In this month's **Today's Word**, Mike Weil discussed "*Five Ways Your High-Performance Business Can SOAR Above your competition.*" SOAR stands for Situation, Opportunities, Action, Results.

Let's take a look at **five more ways** to apply a SOAR approach to making your company stand out in your market.

- **Educate, Don't Sell.** Most contractors learned to sell customers on why they are better, why they offer the best equipment, and why they should be chosen for the job.

The educational approach is very different. It's not about you, it's about the customer and their home. By *teaching* a customer how their system is

installed systems actually work as promised.

As a High-Performance contractor you prove what you are delivering through documented test results — even certified by a third party.

- **Continually Train Your Employees.** Training is not an expense, it's an investment. It must be ongoing to get the results you want to achieve.

The biggest investment in training is not the cost of a class, it's the lost opportunity cost of not having that person in the field generating revenue. This cost needs to factor into your training investment. With good training, your Return on Investment (ROI) should be many times your initial cost.

- **Build A High-Performance Culture.** Maintaining a culture of high performance isn't just training your employees and putting a stake in the ground that you are now different. It requires an effort on your part to keep the fire burning.

Our industry has a lot of ingrained bad habits like just swapping out boxes when it comes to replacements, slapping on the gauges on the condensing unit before verifying airflow, and so forth. It takes a concerted effort to change these habits and keep them from creeping back into your organization.

Oftentimes new hires can inadvertently start to drag a company towards the old ways. It's important to assign a champion in your company who not only helps keep the High-Performance culture alive, but is ever-vigilant to make sure wrong thinking doesn't creep back in.

Of course, there is so much more to each of these ways to SOAR above your competition. But that is exactly what this magazine is all about. Be sure to study both current and archived articles. I know you will find many of the answers you are looking for. **NCI**

IT TAKES A CONCERTED EFFORT TO CHANGE BAD HABITS AND KEEP THEM FROM CREEPING BACK INTO YOUR ORGANIZATION.

performing, and involving them in the testing and discovery process, you have moved from someone trying to sell them something to a trusted advisor who is there to help them buy exactly what they need and want.

- **Make Air Upgrades Part of Every Equipment Replacement.** Virtually every installed system can benefit from an **Air Upgrade**.

This product ensures equipment can perform per the manufacturer's specifications. An Air Upgrade makes it possible for equipment to deliver it's designed capacity as close as possible to its rated energy efficiency.

- **Don't Just Promise Performance, Prove it.** Most contractors promise their work will perform as specified, usually citing SEER and AFUE ratings. Very few can prove that their



# Don't Just Promise Performance, Prove It!™



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