

# **HIGH-PERFORMANCE HVAC TODAY™**

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

## **SUMMIT 2023**

**SERVICE**  
*High Performance Starts Here!*

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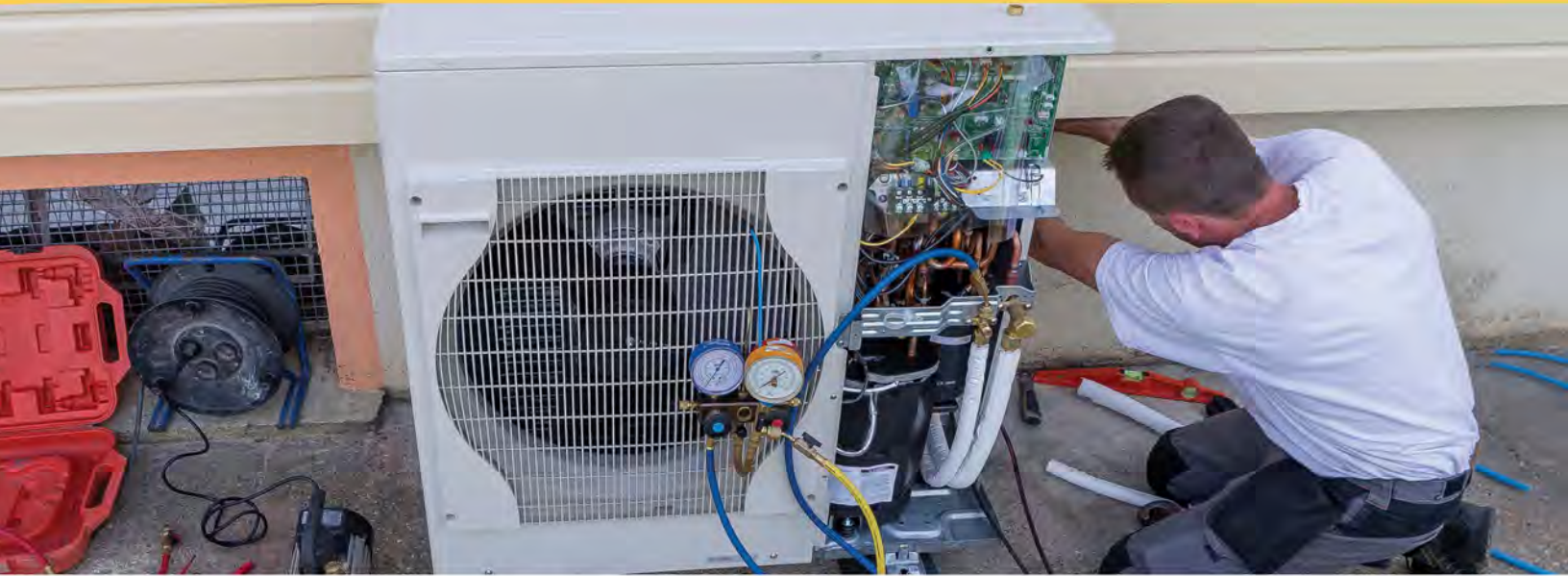
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# HIGH-PERFORMANCE HVAC TODAY™



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# ChatGPT and the HVAC Contractor: Prepare to be Assimilated



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

I must be getting old. As a younger man, technology was like candy to me. I couldn't gobble it up fast enough. From personal computers to personal digital assistants (remember the Treo?), from pneumatic controls to digital building control technology, from the modem days of the Internet to today's web tech and beyond, I was completely enamored.

Then somewhere along the way, the introduction of automatic answering systems began to change things for me. I mean, it's one thing to figure out better ways to control environments and design buildings, but another thing when a customer calls your company and has to listen to a disembodied voice drone on about numeric choices to get them to the department they need.

When I'm calling a department store or a carpet cleaner with a question or a problem, I want to talk to a real person—someone who can help me and make me feel like I've been heard.

Today, automated answering systems are the norm, and I hate it. But what can I do, right?

Now there is this new thing called **ChatGPT**. It is an artificial intelligence (AI) program that is so brilliant (tongue firmly in cheek) that it writes college-level essays and dissertations that can pass as original work. These AI programs work by culling information from the Internet based on search parameters and other algorithms.

Ethically, this poses a problem concerning copyright laws and plagiarism.

On the other hand, AI bots open the door to enhancing existing business management technologies or even replacing them. They can eventually replace automated answering systems.

Some of my media colleagues are touting the great potential for AI bots like ChatGPT in the HVAC space. Some see AI as being able to diagnose HVAC issues for customers by asking

questions and offering suggestions for solutions.


Does this set off alarms with any contractors who do high-performance HVAC work?

On the **HVAC-Talk.com** discussion forum, there is an **entire thread** on the subject. One comment that struck a chord with me was how ChatGPT answers to HVAC questions can "*certainly look convincing to someone not in the industry, but often they (the answers) aren't actually correct or are only partially correct.*"

I understand that no contracting firm will use AI instead of field technicians for testing and diagnosing HVAC system issues. The problem is that the average consumer who encounters this AI bot may take it at face value. Especially now, in the very early days of this technology.

Another comment in that same HVAC-Talk.com discussion says, "*If this (ChatGPT) starts to give step-by-step instructions, there will probably be more homeowner visits to the ER, more homes burning down, and even deaths as a result. The world is full of unqualified people who want to save money, but you should always leave ANY mechanical job to a professional!*"

Many pundits are writing about how ChatGPT and its cousins will change how business is done and become vital to business growth and success in the future. This evolution may be true, but it is still a long way down the road. I get that change, especially technical change, is coming faster than ever before and, as the Star Trek Borg would say, "Resistance is futile."

But in the High-Performance HVAC Contracting universe, face-to-face contact with customers while conducting system performance testing and diagnosis is vital. Furthermore, regarding automated answering systems, let's not assimilate all the latest tech too quickly and make it even harder for customers to talk to a live person. 



## Written by HVAC Professionals for HVAC Professionals

### FIELDPIECE IR REFRIGERANT LEAK DETECTOR

Alright, guys and gals: It's time to put the soap bubbles down and step away from the patient. Soap is meant for cleaning, not leak detection. The **Fieldpiece DR82** is an excellent replacement for soap. It uses infrared (IR) refrigerant leak detector technology with a 10-year sensor. As always, Fieldpiece tools are very durable against our clumsy nature. Each instrument has a large backlit LCD screen.

You should turn on the DR82 outside, away from the refrigerant leak, after it's gone through a warmup period. Once warmup ends, leak detection can begin. Moving the wand back and forth near the suspected area will help pinpoint that pesky leak. When the DR82




senses the leak, it will appear that you have the police rolling up on you. Don't be alarmed at the flashing red lights with the blare – that's the DR82 telling you it found the leak.

The DR82 has four sensitivity levels:

high, medium, low, and Turbo! Turbo helps with locating the harder-to-find refrigerant leaks. For those who like graphs, Fieldpiece thought of you as well: it graphically displays how high the reading is that it detected.

The good news is that using IR technology makes leak detection much faster. Also, battery replacement is unnecessary: the DR82 requires charging every 10 hours. Just remember to throw it on the charger. Full charges require at least six hours. However, the battery lasts 10 to 18 hours once fully charged. You get a nice hard case, five filter tips with gas-kets, and a charging cord.

For more information, visit the Fieldpiece website at [ncilink.com/DR82](http://ncilink.com/DR82).

— by Casey Contreras, instructor, National Comfort Institute 

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# Westland Heating: *We're Not Afraid of Anything*

*"I must not fear. Fear is the mind-killer. Fear is the little-death that brings total obliteration. I will face my fear. I will permit it to pass over me and through me. And when it has gone past, I will turn the inner eye to see its path. Where the fear has gone, there will be nothing. Only I will remain."*

— **Frank Herbert**, author of [Dune](#).

It's not every day that we begin a profile of a successful High-Performance HVAC contractor with a science fiction quote, but in this case, it seems most appropriate.

**Westland Heating and Air Conditioning + Plumbing** was founded in 1985 – a time in history when hijackings of passenger planes and tourist boats were at an all-time high.

It was also a time when great uncertainty existed about war with Russia, and the U.S. economy was slow. In fact, 1985 saw a decrease in real GNP growth from 6.5% in 1984 to 2.2%.

Unemployment was over 7%. There was a lot of fear and worry that year.

because I didn't like digging holes and trenches to reline gas lines in winter. That wasn't for me," he says.

So, in 1985, Mitchell opened the doors of his new company, Westland Heating, Air Conditioning + Plumbing.

## WESTLAND TODAY

For 28 years, Jeff grew the company, added personnel, and set it up to sell to his son, Zack, in 2013. Today, its gross revenues are between \$30 and \$40 million in both the commercial and residential market sectors. On the commercial side, Westland has two divisions: Commercial Construction and Commercial Replacement.



It was really a tough time to start a business. But Jeff Mitchell, who left college early and began working for other contractors, wanted to strike out on his own.

He wasn't afraid of taking this risk, despite the economy at that time.

"I knew I didn't want to be a plumber

On the residential side, Westland has a residential replacement division. Their service department, which includes repairs and maintenance, serves both the commercial and residential divisions.

Jeff says they recently added plumbing to their repertoire through an

acquisition. They do a lot of work with hydronic systems, including water balancing.

"If the system heats or cools water or air, Westland wants to learn about it, install it, and service it," Mitchell says.

They employ from 65 to 80 people depending on the number of projects. Westland also fields around 40 vehicles throughout their market area, which covers most of Northeastern Ohio – from Sandusky to Eastlake.

"However, from a residential standpoint, it makes more economic sense for us to focus on Cleveland's western suburbs because that is our headquarters location," Jeff says.

## MILESTONES

According to Jeff Mitchell, the most significant milestone for the company was the conversion to a younger management team.

"I think one of the most important milestones is growing the company enough to start bringing in the next generation of leaders and managers. After selling the business to my son, Zack, he took over the management of the commercial construction business.

"I changed my responsibilities to focus on being the service manager and making sales within our commercial replacement division," he says.

The next milestone was promoting one of his long-time service tech-



nicians to service manager. His name is Sean Rusnak, and he has worked with Westland since 2003. In addition, Jeff's son-in-law, Christian Wimmer, is a comfort specialist for both residential and light commercial sales. He's been with the company for 23 years.

"Another milestone," Jeff adds, "is that we are developing our guiding attitude, which is, **We're not afraid of anything.**"

He attributes that attitude to the incredible success Westland has enjoyed. "We have never been afraid of being on the leading edge of technology or trying new things that can help us improve our customers' comfort," he says.

### ADAPTING NEW TECHNOLOGY

For example, Jeff tells the story of how Westland became involved with a new product manufactured by York called the *Triathlon*. This product was a gas-powered heat pump.

"Though this product is no longer available, our local utility was promoting the heck out of it at the time. I was intrigued by it. We ended up becoming one of the biggest Triathlon contractors in the country.

"York sent me around the U.S. to talk with contractors about the product and our experience using it. We had all positive experiences with it for the first two or three years until York went into mass production. Then the product quality decreased, and they started experiencing issues."

Similarly, Westland discovered variable refrigerant flow technology almost accidentally. While on vacation in Mexico, Jeff says he saw lines of rooftop units at the resort where he was



Westland Heating, Air Conditioning + Plumbing is located in Westlake, OH, a western Cleveland suburb. Established in 1985, the residential and commercial firm serves much of northeastern Ohio and specializes in High-Performance HVAC contracting.

staying. He describes this equipment as having individual galvanized housing; each stenciled with the word *Multicity* on it.

"I'd never seen this before, so as soon as I returned to Ohio, I began doing some research and eventually discovered it was a Mitsubishi Variable Refrigerant Flow (VRF) product line."

Says Sean Rusnak, "Today, we've done hundreds of installations of VRF systems from Mitsubishi, Daikin, LG, and Samsung. Our team is trained, and we have qualified professionals to work on all those systems. We've installed and serviced them in nursing homes, schools, office buildings, and more."

"We also install them in multi-family buildings and anywhere they make sense," says Christian Wimmer.

Rusnak adds that the company not only seeks out new equipment technologies but is also on the cutting edge of test instrument and tool tech.

"Westland isn't afraid to invest in the proper tools, software, and computers to do the job properly," he says. "The same is true when it comes to training. Westland has always promoted training for all our technicians and installers, both commercial and residential."

### THE TRAINING CONNECTION

Jeff Mitchell smiles when the training topic comes up. "I may not have thought college was for me when I was a young man," he says, "but I have always been fascinated with technology and tools and always wanted to soak up as much knowledge about them as possible. Sometimes the lessons I learned were through taking classes; sometimes, they came from hard life lessons."

He tells a story about taking his family on a skiing vacation in New York years ago, where he decided to take a nap before heading out to the slopes. After two hours, his family woke him up and had to push him to get out of bed and out of the condo.

"I woke up with the worst freaking headache you could imagine. I felt like I was going to throw up. Once I got outside and into the fresh air, I felt a little better. Later, I noticed it smelled like exhaust fumes back in the condo. That was strange because electric baseboards heated the building."

As it turns out, the complex had a large gas-fired hot water tank system that was having problems, and its mechanical room was directly beneath Jeff's bedroom.



Westland management team, from left to right: Jeff Mitchell, Zack Mitchell, Sean Rusnak, and Christian Wimmer.

"I am 100% positive that I was exposed to carbon monoxide. When I got home, I did a lot of research and learned about Jim Davis, whose reputation was that of a CO and combustion safety guru."

Mitchell says they decided that all of Westland's field service and installation teams had to train in combustion safety.

"Safety has always been #1 with us, and this was big," Mitchell says. "Today, we all carry personal CO monitors, and we replace those every few years."

"That was at least 20 years ago, and the company Jim Davis worked for, National Comfort Institute (NCI), was in its early days," Jeff says. "Now we're heavy into airflow and performance testing. I inspect everything when on a job."

## THE STRUGGLE IS REAL

Regarding duct renovations, the Westland team agrees that they don't do as much as they'd like.

Says Mitchell, "I hate to say it, but the market is very competitive. We certainly talk about the ductwork, and if a customer is willing to listen, chances are we

will land renovation work. We do a lot of repairs, add returns, and so on."

Rusnak says they instruct all their service technicians to

check static pressure on every call for new and existing customers. They record measurements in forms built into their Service Titan software management system.

"We then can go through those forms looking for static pressure points that flag customer issues. These points are the telltale sign that something is not working properly. If we see something in those pressures, we make a note to follow up," Rusnak says.

"Based on their findings, technicians recommend changing the filter to allow better airflow. They may also find an issue with the return duct, which becomes a lead for Jeff or Christian. And, as Jeff says, if a customer is

willing to listen, we can get past their objection. We provide options and don't force repairs on anyone.

"Our slogan is, **We Make Your Life Comfortable**. In the end, that has to be the focus of our approach."

"But the struggle is real, especially on the residential side," Rusnak continues. "Many people are motivated by price, and we cannot perform the testing and necessary repairs for a low price."

Christian Wimmer concurs. He says, "our field people must understand how to explain things to a customer in simple terms so that it makes sense to them. I believe people interpret things differently all the time," Wimmer says. "Technicians can interpret static pressure differently as well. It's a slippery slope because you don't want to overstep what you're doing and scare customers."

"That's why training the technicians and the customers so that everybody has the same understanding of what's good, what's bad, what's of immediate concern, and what can wait is so important."

"The challenge," Jeff Mitchell adds, "is getting your team to communicate in a way that customers can understand. When you can do that, in most cases, they will buy."



## THE FUTURE LOOKS BRIGHT

Regarding the future of Westland Heating, Air Conditioning, + Plumbing, Mitchell, Rusnak, and Wimmer all agree:

Westland fabricates its own custom duct fittings and sheet metal runs in their comprehensive shop.

HIGH-PERFORMANCE HVAC TODAY



focus on customer comfort, fear no new advances in technology, always provide the best training, and the company will continue to grow.

Rusnak says NCI's training has dramatically impacted the Westland team, especially the CO and Combustion safety training. He says nine out of 10 service techs are certified in combustion analysis.

"The air balancing and static pressure classes are also critical to us," Rusnak says. "We apply the lessons from those classes to every HVAC system. If air is moving through ductwork, then balancing and measuring are necessary to diagnose systems. This measuring and balancing process is how we make customers more comfortable, and their HVAC systems work

more efficiently."

"Our success is pinned on the fact that we are not afraid to do what's right for customers. We have no fear because we are well-trained and know our business," says Christian Wimmer.

"Knowing what to do when encountering different situations in the field is important. And we see so many things like undersized ductwork that's falling, returns starting to come loose, and cracked heat exchangers. It makes me sick as I wonder how long these conditions have endangered the customers," Wimmer adds.

"Performance training for our guys is the groundwork behind our success," Jeff Mitchell concludes. "With

performance training, they can expand their vision, keep themselves and their team safe, and protect their customers. And one more thing: they can make much more money and be much happier."

For these and many other reasons, the **High-Performance HVAC Today** magazine team has selected **Westland Heating, Air Conditioning, + Plumbing** as the *March Contractor Spotlight*. Congrats to the entire team. **NCI**





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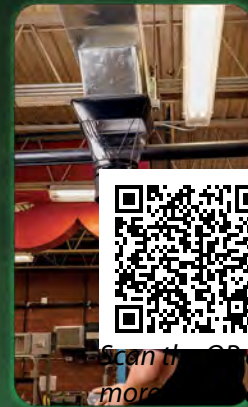
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# **SERVICE:** High Performance Starts Here!



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This year's conference focuses on the critical steps to building a solid high performance maintenance program, fixing systems right the first time, and generating leads for profitable equipment replacement and Air Upgrades.

## HIGH PERFORMANCE Starts with Service

NCI's Summit has become the gathering place for High-Performance Contractors across North America. It's the only event of its kind completely focused on servicing, 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 high performance professionals.

The most successful high-performance HVAC contractors understand that testing and diagnostics by their service and maintenance teams provides huge returns, both in terms of fixing "system" issues on the spot, and generating leads for equipment replacement with add-on Air Upgrades and duct system renovations.

At Summit this year NCI's instructors and coaches will facilitate discussions on several key implementation areas to help you build a solid roadmap to take you to the next level.

## BREAKOUT SESSIONS:

- Profitable System Upgrade Leads through Testing and Diagnostics on Service Calls
- Keep Customers Safe and Generate Leads with CO Safety and Combustion Testing
- Increase Sales Success by Properly Managing Service-Generated Leads
- Build Lifetime Customers with High-Performance Maintenance Agreements
- Deliver High Performance with Hands-on Diagnostics in Low-Performance Town.



## BE SURE TO BRING TECHNICAL, OFFICE, AND SALES STAFF

This year all sessions all repeat! You will have the opportunity to attend each one. To get the most from these sessions we recommend you bring at least 3 people. Be sure to ask about our special 3-Pack offer!

Visit the Summit Week website at [GoToSummit.com](https://www.goetosummit.com) to reserve your seat for what will be another top notch, educational Summit experience. Seats are limited this year and going fast, so don't delay, register for Summit 2023 in Branson, MO 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 TRADESHOW:** Our partners help make this conference possible. Show your appreciation by attending the trade show events. Who knows? You might find that next great product or idea!

**IDEA MEETING:** All 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

### **Profitable System Upgrade Leads through Testing and Diagnostics on Service Calls -**

*Facilitated by Al D'Ambola*

This highly interactive session focuses on generating unlimited system upgrade leads by simply performing and recording static pressure measurements on every repair and maintenance call. This session will help you gain new ideas to get your whole team focused on the importance of executing basic diagnostic procedures on every repair, maintenance, and installation opportunity. Learn from your peers as they share their insights about what they have learned, what works, and what doesn't work.



### **Keep Customers Safe and Generate Leads with CO Safety and Combustion Testing -**

*Facilitated by Jim Davis*

In this interactive session, you will have an opportunity to exchange thoughts on how to keep your customers safe while generating leads with carbon monoxide (CO) and combustion testing. The discussion will focus on the importance of why and what to test on every call including ambient CO testing and what to do in various situations.



### **Increase Sales Success by Properly Managing Service-Generated Leads -**

*Facilitated by David Holt*

Unfortunately, many proactive sales opportunities generated by repair and maintenance technicians that perform routine static pressure measurements are handled very poorly, if at all. Without a solid plan, these golden opportunities get stacked up in a desk drawer or simply fall through the cracks. This results in frustrated customers, unhappy service techs, unemployed comfort advisors, underemployed installers, and reduced company profits. In this session, we will discuss a simple step-by-step process for effectively managing and responding to these great sales opportunities.



### **Build Lifetime Customers with High Performance Maintenance Agreements -**

*Facilitated by Jim Ball*

Wouldn't it be nice to have an expanding group of 'raving fans' for your business? A high-performance maintenance agreement program will help your team take better care of customers, transforming them from "occasional buyers" into "lifetime partners". When you attend this workshop, Jim Ball will help you discover how to build a strong maintenance agreement program based on NCI's high performance processes.



### **Deliver High Performance with Hands-on Diagnostics in Low-Performance Town -**

*Facilitated by David Richardson and John Puryear*

There are hidden defects plaguing the residents of low-performance town. Can you diagnose and provide solutions to their problems and bring them back to their high performance days? Learn to walk the "PATH to Performance" as you measure and diagnose, static pressure, airflow, temperature, and delivered Btus. Once you test and diagnose the problem(s), you'll make adjustments and assemble a scope of work to improve system performance. Don't miss this interactive session where we will introduce new test instruments to NCI's training offerings.






# SUMMIT WEEK 2023

## SCHEDULE OF EVENTS


### SUNDAY, APRIL 16

#### Pre-Summit Events

8:00 a.m. - 3:00 p.m. High-Efficiency Sales Workshop - by Daikin 

### MONDAY, APRIL 17


#### Pre-Summit Events

8:00 a.m. - 3:00 p.m. High-Efficiency Sales Workshop - by Daikin 

8:00 a.m. - 5:00 p.m. Advanced Airflow Diagnostics with Hands-on – Recertification Class

8:00 a.m. - 5:00 p.m. Advanced CO & Combustion Diagnostics – Recertification Class

5:15 - 5:45 p.m. Summit Orientation Meeting – All Welcome!

6:00 - 8:00 p.m. Welcome Reception Sponsored by Daikin Comfort Systems 

### TUESDAY, APRIL 18

7:00 - 9:00 a.m. Breakfast and Interactive Opening Session

9:15 - 10:45 a.m. Breakout Sessions 1 – Workshops

11:00 a.m. - 12:30 p.m. Breakout Sessions 2 – Workshops

12:30 - 1:30 p.m. Luncheon and General Session

1:30 - 3:00 p.m. General Session – Keynote Speaker: Jan Spence

3:00 - 5:00 p.m. Idea Exchange Meeting – Optional - \$20 cash entry fee - contractors only

6:00 - 8:00 p.m. NCI Partner Trade Show Reception

### WEDNESDAY, APRIL 19

7:00 - 8:30 a.m. Breakfast & General Session

8:30 - 9:00 a.m. State of High-Performance HVAC – with NCI President & CEO, Dominick Guarino

9:30 - 11:00 a.m. Breakout Sessions 3 – Workshops

11:15 a.m. to 1:15 p.m. NCI Partners Tradeshow and Luncheon

1:30 - 3:00 p.m. Breakout Sessions 4 – Workshops

3:15 - 4:00 p.m. NCI Partners Educational Sessions

4:15 - 5:00 p.m. General Session: Idea Session Winners and Partner Prize Drawing

6:00 - 7:00 p.m. Sponsor Appreciation Cocktail Reception

7:00 - 9:00 p.m. Awards Banquet and Presentation Ceremony

### THURSDAY, APRIL 20

7:00 - 9:30 a.m. Breakfast & General Session

9:45 - 10:30 a.m. NCI Partners Educational Sessions

10:45 a.m. - 12:15 p.m. Breakout Sessions 5 – Workshops

12:15 - 1:30 p.m. Closing Luncheon – with NCI President & CEO, Dominick Guarino



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# What Does It Take to Win with Maintenance?

**M**ost people measure whether they are winning at something by the amount of money they make. This definition of winning may be the reason most HVAC businesses steer clear of maintenance. Our industry views maintenance as a *loss* on the scorecard. But is it?

There are companies that, almost like ghosts, haunt the rest of the industry with successful maintenance programs that win for all parties involved. These ghosts quietly take care of customers and keep them as raving fans. They find ways for their customers, their co-workers, and their businesses to win. Wouldn't it be nice to spend some time with those ghosts and get an inside peek at what makes them winners?

## DO CUSTOMERS WIN?

In business, nothing matters if the customer doesn't win. Successful [maintenance programs](#) place the customer first.

All processes and procedures are there to serve the customer.

Great maintenance programs find processes and procedures that exceed customer expectations for years to come.

If you were the customer, what elements of a maintenance program help you to win?

Some common winning features include:

- Pre-scheduled tune-up
- System performance evaluation
- Seamless monthly payment plan
- Visible system improvement
- Priority service
- Discounts on service and accessories
- Tidy work areas
- Respect for customer's home and family
- Clean trucks parked in the appropriate place.

## DOES THE TEAM WIN?

The HVAC industry faces a severe [labor shortage](#). Not having a large enough labor force can cause a deterioration in the quality of work performed. Why? Because fewer techs try to squeeze in more calls and spend less time discovering the source of customer complaints. Quality is bound to suffer.

Also, a smaller workforce usually has a higher overtime percentage. Overtime means technicians lose time with their families. This leads to things like burnout and bad attitudes. Will quality work suffer as a result? You bet.

Your team members must have your respect and concern for the





challenges this type of work causes. So to have a successful maintenance program, you must have successful co-workers. This means hiring people with the right attitude, then training them to provide top-shelf craftsmanship on every job.

Then there is the whole career aspect. Providing **HVAC careers and training** for your team is so essential by today's standards. When your team members know the progression of their careers and they know you reward quality work, they will work harder and help the entire company be successful.

Unfortunately, many within the HVAC Industry view maintenance work as 'busy' work. They view it in the same light as when a teacher gives the substitute busy work for the class to perform when the teacher is out.

They don't place a high value on maintenance that our customers and co-workers can rally behind. If we treat maintenance tune-ups like an option, then maintenance will never be more than just busy work. **Teams must understand the importance of regular maintenance,** and owners must continually re-enforce its value.

Contractors whose teams win with maintenance have found a way to value this work. It's not busy work. It becomes a pathway for the homeowner to know their system is operating safely, their home environment is healthy, and they are more comfortable. Maintenance assures customers their system is also operating efficiently.

Features winning teams have in common include:

- Training programs that correspond to pay increases

- Performance bonuses for quality work
- Company provided uniforms
- Public praise/private reprimand.

### CAN THE CONTRACTOR WIN?

You already know the answer. You also know it is not easy to have a maintenance program that wins. High-Performance Maintenance Contractors all measure, evaluate, change, and re-measure. A winning contractor must spend time training themselves. They must seek ways to improve their own performance even as they seek to improve their team's performance.


Contractors who win can expect the following:

- Customers who are Raving Fans
- A successful, trustworthy team
- Steady, predictable work schedules

- A reputation for quality work
- Consistent income.

### NCI CAN HELP WITH SUMMIT 2023

In each section of this article, I listed features a single High-Performance Contractor uses to Win-Win-Win. Can you imagine being in a room full of successful contractors all sharing their experiences?

You will have that opportunity at National Comfort Institute's **High-Performance HVAC Summit 2023**. Come join us! You will hear experiences and share ideas with other High-Performance Contractors in each session. There will be some ghosts haunting these sessions and I can't wait to learn how to be a winner. 

## Jim Ball's Upcoming Summit 2023 Discussion



This article is based on an upcoming discussion moderated by **Jim Ball** at National Comfort Institute's 2023 **High-Performance HVAC Summit** in Branson, MO. In its 20th year, this event focuses on the High-Performance HVAC Contracting segment of the industry and promises to be something you and your team should not miss.

If you haven't done so, sign yourself and your team up. Plan to join your peers from across the country in **Branson, MO, from April 17-20.**

You can learn about upcoming sessions, special events, registration savings for members, and more at [gotosummit.com](https://gotosummit.com).

Also, **book your hotel rooms** as part of the NCI discounted block.

**Jim Ball** is a long-time National Comfort Institute (NCI) shining star and an effective implementer of High-Performance HVAC. He recently sold his family HVAC service company and looks to give back to the industry by contributing his NCI knowledge and experience.

If you're an HVAC contractor or technician interested in learning more about High-Performance HVAC, contact Jim at [ncilink.com/ContactMe](https://ncilink.com/ContactMe).





# Cutting-Edge Training

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## UPCOMING NCI TRAINING SCHEDULE

### PUBLIC LIVE TRAINING

#### Airflow Testing and Diagnostics

March 2: Baton Rouge, LA  
March 28: Lafayette, LA  
March 30: Mobile, AL  
April 11: Lubbock, TX  
April 13: San Antonio, TX

#### Residential HVAC System Performance and Air Balancing Certification Bundle

March 7-9: Grand Rapids, MI

#### Duct System Optimization and Air Balancing Certification Program

March 14-16: Charlottesville, VA  
March 28-30: Lansing, MI  
March 28-30: Sacramento, CA

#### Refrigerant-Side Performance Training Program

March 21-22: Austin, TX

### PUBLIC LIVE TRAINING (cont.)

#### Combustion Performance and Carbon Monoxide Safety Certification Program

March 21-23: Grandy, MN

#### Commercial System Performance Certification Program

April 4-5: Richmond, VA

#### High-Performance HVAC Design and Redesign

April 4-6: Austin, TX

### PUBLIC ONLINE LIVE TRAINING

#### Airflow Testing and Diagnostics - ONLINE LIVE

March 21-22

### \*SCE SPONSORED LIVE TRAINING

#### Hydronic Testing, Adjusting, and Balancing - SOLD OUT

March 7-8: Anaheim, CA

### \*SCE SPONSORED LIVE TRAINING (cont.)

#### Duct System Optimization and Air Balancing Certification Program

March 14-16: Anaheim, CA

#### Test and Certify Ventilation Systems and Economizers Certification Program

March 28-29: Tulare, CA  
April 4-5: Anaheim, CA

#### \*\*TECH CLEAN CALIFORNIA TRAINING [ncilink.com/TECHCleanCA](http://ncilink.com/TECHCleanCA)

#### Refrigerant-Side Performance Training Program

March 21-22: Anaheim, CA  
March 21-22: Sacramento, CA

#### Residential HVAC System Performance and Electrification

April 4-6: Sacramento, CA  
April 25-27: Anaheim, CA

\* NCI training sponsored/subsidized by Southern California Edison (SCE) for qualified local contractors.

\*\* NCI training sponsored by TECH Clean California for qualified local contractors.



Visit **[NCIlink.com/ClassSchedule](http://NCIlink.com/ClassSchedule)** to view the latest schedule.



# How Can Financing Options Sell More High-Performance Systems?

**W**ith inflation top-of-mind, residential customers may hesitate to invest in their HVAC systems through High-Performance HVAC technical services or equipment replacements. They may be more concerned with sticking to a budget without considering how the overall value of these adjustments can outweigh the price tag and even save them money on utilities.

High-Performance Contracting is about system performance, not just equipment performance. Like the human body, households have complex systems that work together to function properly. The house itself is a part of the system. If one part is neglected, the other parts will suffer.

When we go to the doctor, they test our temperature, blood pressure, cholesterol, and more. In the same way, HVAC contractors should test and measure airflow, outside air leakage, and temperature rise and drops.

Ignoring any part of this process can prohibit new systems from performing at the top of their specifications, impacting customers' energy bills and overall satisfaction.

That's where professional contractors can jump in and help customers understand the benefits of a new, higher-efficiency system specified after taking measurements and testing variables into account. When done correctly, the sales process discovery phase will raise customer questions about household comfort, system efficiency, and even how the right system can help them avoid health concerns like allergies or asthma.

It is easy to list the financial and non-financial benefits of High-Performance HVAC systems. But it is also essential to ensure these better-performing systems are affordable for homeowners.

With the [median transactional account](#)

[balance at \\$5,300](#), many U.S. households cannot afford the highest-quality system outright.

Giving customers insights into the benefits of High-Performance HVAC systems is easy. The difficulty comes in helping them figure out how to pay for it.

## MAKE BETTER SYSTEMS MORE AFFORDABLE

High-Performance HVAC systems offer many benefits:

- They can make a home more comfortable, safer, and improve indoor air quality
- They can lower utility bills by [reducing energy usage](#)
- They may even [pay for themselves](#) in three to five years.

Financing options can be an excellent opportunity for contractors who specialize in or want to focus on selling more High-Performance HVAC systems. Breaking HVAC project cost into monthly loan payments can lessen the initial sticker shock and help customers afford higher-efficiency system designs and repairs.

It allows customers to purchase quality duct system upgrades, potential equipment replacements, and increase their energy efficiency without having to commit a large amount of money upfront.

Financing options can make it easier for customers to choose more expensive, higher-value systems and keep money in their pockets. We are in a subscription economy and consumers are used to getting sold monthly payments alongside upgrades. They are also used to making monthly payments on everything from cars to cell phones.

This sales approach can cater to buyers looking for short-term promotional financing



or those budget-conscious buyers interested in low monthly payments.

Homeowners are not the only ones who benefit from high-performance systems; contractors benefit too. Higher quality systems mean higher ticket prices and increased margins.

Plus, you can grow your business through referrals if you build a reputation for selling products and services that solve customer comfort and energy cost issues.

### DON'T LOSE CUSTOMERS WHO NEED FINANCING

HVAC financing options are more than just a customer benefit — they're becoming necessary. In a [1,600-person survey by Mosaic](#), 35% of homeowners said that financing options are essential in their hiring decision and that they could not take on projects without it.

In today's economy, customers rely on low monthly payments to help fit upgrades into their budgets. Contractors not offering financing options may lose business to competitors that do.

The most strategic and successful businesses innovate for their customers' needs. Offering financing options

at the point of sale makes it easier for customers to say 'yes' to High-Performance HVAC systems.

By breaking it down into affordable monthly payments, customers can get the best system for their budget — and contractors can grow their margins simultaneously. One example of this sales approach is the "Good, Better, Best" technique.

This sales technique presents customers with three (or more) different system options:

- Basic repair and air upgrade options tend to be the most cost-effective
- A more advanced diagnostic testing and solution approach enables customers to choose immediate fixes and other corrective actions
- And a higher-priced approach that includes duct repairs and equipment changeouts. Though more expensive than the first two options, this one may offer the best savings long-term.

When you present three options including low monthly payments, customers can see that the "best" product option doesn't have to break their budget, especially with high-performance systems' added cost-saving benefits.

### CHOOSING A LENDING PARTNER

Whether it is a specialty consumer lender like Mosaic, a local credit union, or a larger bank lender like Wells Fargo, contractors have plenty of choices. It is best to go with the lender that fits seamlessly with your sales process and market strategies.

Some of the questions you can ask lenders to make sure they're the best choice for you are:

- Credit requirements
- Customer experience
- How and when you'll get paid
- What requirements are enforced by the lender?
- Sales support/hours of operation
- Technology and performance.

Lenders should offer your business more than just loans. The partnership should include sales training, monthly data reporting, and homeowner support. In these ways, the lender's value can go far beyond price.

When in doubt, simplicity rules in the world of financing options. Contractors have enough to concentrate on, so offering payments at the point of sale must be a seamless experience. Ultimately, contractors want to run a credit application, get approval, and get paid without a hiccup.

Customers want to afford the best systems without breaking their budget. A good lender should be able to help contractors accomplish both. **NCI**

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<sup>1</sup>10-year, fixed-rate, \$21,500 loan with an 7.99% APR  
<sup>2</sup>10-year, fixed-rate, \$17,500 loan with an 8.99% APR  
<sup>3</sup>7-year, fixed-rate, \$12,500 loan with an 8.99% APR  
 -Annual Percentage Rate (APR) in the example includes a 0.25% interest rate reduction for borrowers who sign up for automatic payments. Interest Rate and monthly payments will increase if borrower changes payment method.

Home improvement loans through the Mosaic platform are issued by WebBank, Equal Housing Lender.

**Eric Torykian** is a business development executive at **Mosaic** in San Diego, CA. He has been with the company since 2021 and specializes in consumer lending, energy efficiency finance, HVAC finance, and much more. You can reach him at [ncilink.com/ContactMe](mailto:ncilink.com/ContactMe).





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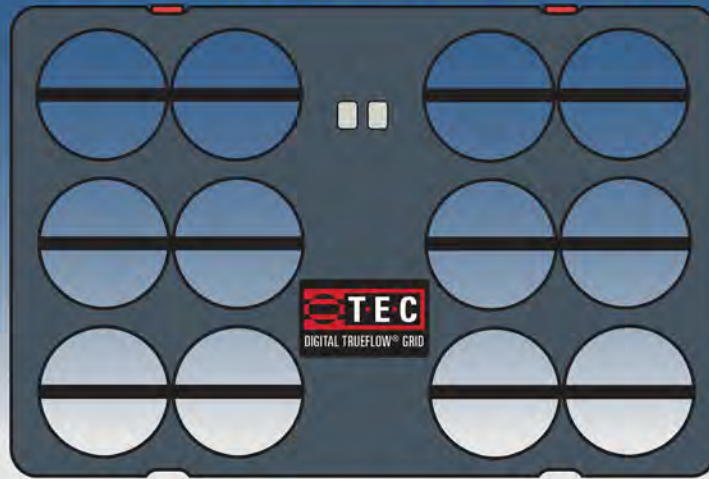




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## Why Attend the 2023 Summit?



Each year, the team at National Comfort Institute solicits input from Summit attendees to discover what they liked, what we can improve, and why. This year's program is a direct result of those inquiries. In other words, this is the Summit that YOU asked for.

This year's workshop format is genuinely different in that it breaks the traditional "seminar" approach. Here's how it will work:

Attendees will be divided into four teams. Each team will go through four discussion-style workshops throughout the three-day event. Each workshop will be led by an NCI instructor who will moderate the session and keep it on track.

This is designed to draw from the "**Wisdom of the Crowd**." Now attendees can share their successes and failures in each agenda area. This knowledge will help you make high-performance an integral part of your company's culture and business model.

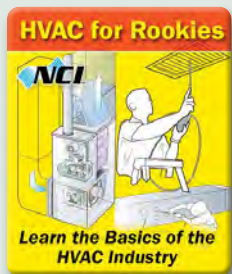
**BONUS:** All sessions will be recorded and available to every Summit attendee so you can review your four sessions and the other three sets of sessions from the other teams. That's a total of 16 workshop recordings! This will allow you to extend learning beyond Summit Week to help you and your team implement solid best practices year-round.

Call your customer care rep for more information about this at 1-800-633-7058. Join your fellow High-Performance HVAC contractor peers in Branson, MO, from April 17th to 20th, 2023. You

can find all the details here: [gotosummit.com](https://gotosummit.com). Register at: [ncilink.com/23SummitReg](https://ncilink.com/23SummitReg).

## Popular On-Boarding Training

National Comfort Institute's Online University is a digital library of training that members and non-members can use to train their staff in various disciplines of a High-Performance HVAC company.



**NCI Online University** also offers business and customer service training. The **HVAC for Rookies** class, for example, takes what can be a very complex business and breaks it down into manageable chunks of information.

This offers the office staff an idea of the big picture of what HVAC companies do. These classes can be repeated as often as needed, unlike a live class.

**Alana Ward**, owner of **Baggett Heating** in Clarksville, TN, says, "I love HVAC for Rookies. The benefit for me is that the presentation materials are professionally done, compact, and deliver consistent messaging for every single person who watches it."

"I also love NCI's Online University. We make a lot of use of the Airflow and Diagnostics modules as well as the online live classes. We are a small company and it's so hard to dedicate the time and dollars to send people to training classes. I know training is important and being able to have access to these classes online, with no expenses involved, is a game changer for me."

So, if you are looking for an easy way to

provide **on-boarding** training to new office, field, or other team members, consider using NCI's Online University. **HVAC for Rookies** is just one of dozens of virtual courses NCI offers online.

Go to [ncilink.com/OLU](https://ncilink.com/OLU) to see all the Online University courses that are available. Or call your customer care representative at 1-800-633-7058.

## NCI Announces Summit Keynoter

National Comfort Institute (NCI) is pleased to announce that former pro female football player Jan Spence will address attendees on leadership lessons during Summit 2023 in Branson, MO.



Jan Spence


Spence shares how pursuing her lifelong dream of playing professional football led to the unexpected opportunity to affect change through powerful words and simple actions. Applying her "Cheer Leadership®" approach in HVAC sales and service builds stronger connections, increases trust with prospects, customers, and employees, and ultimately increases productivity.

Attendees will learn to:

**Implement** practical ways to encourage and connect with prospects, customers, and colleagues through sales and service.

**Discover** and use their new Cheer Leadership® skills in the workplace to increase productivity.

**Create** a plan to have deeper connections with employees and clients in a distinctive way to increase sales, engagement and loyalty.

We hope to see you in Branson in April. 



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# Check the Refrigerant-Side Last, Not First!



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**O**ur industry has a dark secret and it's time we talk about it. Most techs and installers use their refrigerant gauges as the first go-to tool when on a no-cooling call. Many even put the gauges on first when they are doing routine maintenance. This is the worst thing you can do on maintenance, service, and even installation calls. There is no way to verify if a charge is correct without knowing one critical piece of information: **Airflow at the indoor evaporator coil.** Unless techs first verify airflow, they may think the charge is off.

## CLOSED SYSTEMS DON'T CONSUME REFRIGERANT

I can't tell you how many times I've heard a homeowner say, "They topped off my Freon." Anyone in our industry with even the most basic knowledge should know these are sealed systems, and refrigerant doesn't get "used up" like oil in a gas engine. If you have anyone on your team saying that, tell them to stop immediately!

## COMPRESSORS DON'T DIE, THEY ARE MURDERED

The top cause of compressor failures is not defects. Compressors fail based on how equipment is installed or serviced. Charging without knowing airflow can cause many issues, including coils freezing and compressors slugging due to liquid flood back.

Occasionally a bad thermal expansion valve (TXV) can cause failures as well, but the top issue is inadequate airflow. There is no earthly reason to gauge-up on a system before checking airflow. Measuring evaporator temperature change ( $\Delta T$ ) is not the right way to verify airflow.

Another important reason to not disturb the refrigerant system is doing so can cause problems

including leaks, introducing non-condensables, and cross contamination. Also, every time you "tap" in you are reducing the charge because of what remains in the hoses.

If you don't know actual airflow across the coil, and touch the refrigerant side, you are likely guilty of malpractice. It's like a surgeon not getting vital health information – or not washing his or her hands - before cutting into you.


## THE RIGHT WAY

Let's look at the two correct workflows for service and maintenance:

**1. Maintenance.** When performing maintenance, leave your gauges in the truck! After your cleaning and inspections, measure Total External Static Pressure (TESP) at the correct equipment test points, then measure  $\Delta T$  across the evaporator coil.

If you're not getting the right temperature drop across the coil and static pressure is off more than 10%, alert your customer and ask permission to dig deeper at your regular service rate. If you don't have diagnostic capabilities, bring in a tech to do more testing and offer solutions.

**2. Service.** If the issue is a no-cooling or poor cooling problem, verify airflow first. If your  $\Delta T$  is off and airflow is low, offer to test further. Once you have correct airflow, check temperatures at the coil. If good, don't touch the refrigerant side. If not cooling properly, then check and adjust charge if needed.

Follow these two simple workflows and you'll have happier customers. You'll also generate great leads for equipment replacement, air distribution upgrades, and renovations. By integrating this approach into your culture you'll see customer satisfaction and referrals soar. You'll also have happier technicians and a bigger bottom line! 





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