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ALSO IN THIS ISSUE:

- Branding for High-Performance HVAC Contractors
- The Role of Safety in Your Brand
- Dual-Fuel Heat Pumps Meet Demands

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Branding: A Cornerstone for Success in the High-Performance HVAC™ Industry



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

The art of branding stands as a fundamental cornerstone for HVAC businesses to distinguish themselves and thrive in a highly competitive market. Branding is more than just a logo or a company name; it is the entirety of a company's identity, values, and the promise it extends to customers.

UNDERSTANDING THE HVAC LANDSCAPE

This industry is dynamic and competitive, with numerous players vying for attention and market share. HVAC contractors face the challenge of not only providing quality services but also standing out in a crowded market.

Facing the Music, the Challenges, and Changes of increasing demand for energy-efficient and sustainable solutions, consumers are becoming more discerning and seeking contractors who align with **their** values and needs.

As High-Performance HVAC contractors, your brand is ready made, but you need to make that clear to customers.

THE ESSENCE OF HVAC CONTRACTOR BRANDING

Branding goes far beyond a catchy tagline or a visually appealing logo. It's about defining a company's identity, values, and the unique promise it offers to customers. Branding is about creating a consistent and memorable experience for every client interaction.

For example, in 2023, artificial intelligence technology (AI) began making its presence known across all industries. Despite a lot of potential, can apps like **ChatGPT assimilate HVAC contractor** customer relationship models? How will that impact your brand?

Remember, a strong brand identity is the guiding light that shapes every aspect of your business,

from the initial customer impression to the service provided and the ongoing relationship built. It's also about the brand your coworkers see. For example, when you pay them well, **keep them safe** during extreme seasons, and **engage with them**, your brand, in their eyes, grows more important.

BUILDING TRUST AND CREDIBILITY

Establishing trust and credibility is vital. Consumers don't only look for services; they want a partner to rely on for their HVAC needs. Leveraging NCI certifications, industry awards, and other affiliations can strengthen your credibility. Showcasing customer testimonials and reviews also plays a vital role in building trust.

For example, being the local expert on things like **new refrigerants**, **indoor air quality**, and even **forecasting** contribute to how your community sees you.

ONLINE PRESENCE AND COMMUNITY ENGAGEMENT

Having an online presence continues to be indispensable. A professional website reflecting the brand's essence and values is your virtual storefront for potential clients. Social media and content marketing are powerful tools for engaging with the audience and showcasing expertise.

Simultaneously, engaging with the local community through sponsorships, events, and partnerships contributes to a brand's visibility and rapport within the neighborhood.

Branding is not peripheral to your business — it's the essence that defines a company's relationship with customers. By investing time and effort to create a strong brand, you position yourself for long-term success. Embracing the power of branding is not just an option; it's an imperative step towards building a thriving HVAC business. 

Written by HVAC Professionals for HVAC Professionals

The Power of NCI Bucks

At [Punbar LLC](#), we receive National Comfort Institute (NCI) Bucks annually to provide in-person training for our field service and installation technicians.

The **NCI Bucks** process is straightforward. Typically, we enroll our technicians in the relevant courses, and a dedicated NCI representative handles the application of bucks towards our training expenses.

In fact, each time we call to register, the representative lets us know how many bucks we have available to apply toward that class' registration fees.

This program is part of our **Learning Excellence Premium membership** to NCI, and we earn bucks based on the products and services we buy through

their [Training Incentive Partnership Program](#) (TIPP). Our membership includes unlimited online training and the maximum percentage of TIPP NCI Bucks, plus one paid Summit seat and a print subscription to **High-Performance HVAC Today** magazine.



I strongly endorse National Comfort

Institute and their training programs as they help us ensure our team stays up-to-date on our High-Performance HVAC certifications and processes. At [Punbar](#), we find that being able to reduce the cost for live training using their "Bucks" program is amazing.

This year, we are exploring partnerships with more of NCI's vendors that can offer us enhanced opportunities to acquire additional NCI Bucks, such as collaborating with Goodman as our equipment supplier.

To learn more about the power of NCI Bucks, go to ncilink.com/Bucks.

You can also learn more about TIPP at ncilink.com/TIPP, and membership here: ncilink.com/NCIMembership.

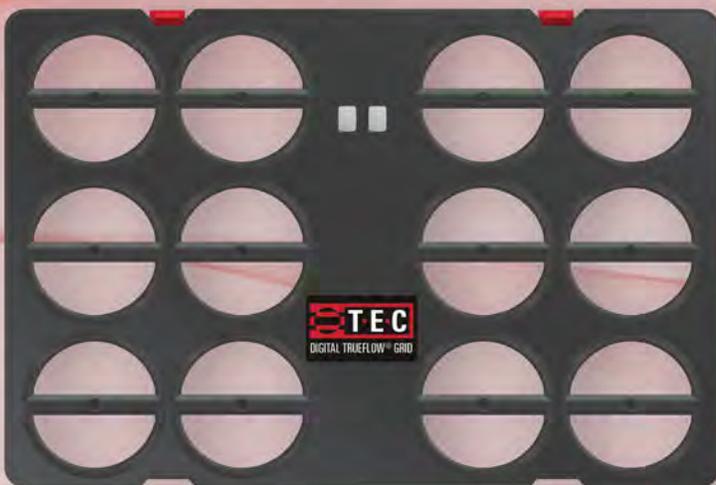
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Jerry Kelly Heating and Air Conditioning - Then and Now

In 2019, *High-Performance HVAC Today* magazine spotlighted [Jerry Kelly Heating and Air Conditioning](#), a Saint Louis, MO area contracting firm focused on the residential service and replacement marketplace. At the time of that writing, the company had \$12.5 million in gross sales, 67 total employees, and fielded around 18 service and seven installation vehicles.

They were two years into “living” in their new 21,000 sq. ft. headquarters building in St. Peters. The new building gave the Jerry Kelly team room to continue growing and building their brand in their market area.

Today, the company fields more than 50 vehicles, 68 employees, and is on track to hit \$16 million in revenues.

According to co-owner Steve Miles, the company’s success has much to do with a professional approach to service, and strong efforts in streamlining internal and external processes.

When Steve’s wife and owner of Jerry Kelly Heating was forced to retire to care for her mother who suffers from Alzheimer’s Disease, the company needed to beef up its leadership team.

“Today, we have a great general manager, Shelly Smith,” he says. “We helped build her marketing and operations team. And she’s got a good team. She handles many of the day-to-day operations, which allows me to spend more time working on the business.”

Miles says that, for now, this isn’t a

retirement plan for him.

“It’s always good to set up the business to run whether you’re in the driver’s seat or not. I still develop initiatives, and then Shelly’s team executes them. By that, I mean, when I come up with an idea to streamline or grow the business, we’ll discuss it, and they do what it takes to put it into action and see if it actually works.”

THE ART OF STREAMLINING

Many of the initiatives Miles talks about focus on improving processes, working smarter, and taking advantage of the modern tools they use for managing the business.

He says the most significant investment they’ve made in this area is incorporating the [Service Titan](#) management system. It has many automation features like smart dispatch and other built-in AI-based technologies to smooth out operational processes.



“For me, improving our processes has always been a focus. I believe it helps us better manage the back end and helps our field teams be seen as more professional in the front end,”

Miles explains. “Though artificial intelligence can be a little concerning if not used correctly, it takes the variability out of managing the business.

“Sometimes you lose a bit of the personal touch, but in the end, AI helps us help our customers to be better satisfied with their interactions with us.”

He says though AI has a lot of potential, it still requires his team to keep an eye on it. “The technology is still in its early evolution, so you must be careful with it.”

PROFESSIONALISM AND TRAINING

One thing that hasn’t changed since our last profile of Jerry Kelly Heating and Air Conditioning is their keen desire to be the most professional company in their marketplace. To do that requires a lot of training.

“First impressions matter,” Miles says. “If a technician shows up to a customer’s home wearing torn blue jeans and a dirty T-shirt with unkempt hair and beard, that’s not the impression I want to make. I certainly would be uncomfortable letting someone who looks like that into my house.

“Appearance is everything. That’s why we try and keep our techs in clean uniforms. We require them to have neatly trimmed hair and beards.

“We want them to exude a professional appearance because we are professionals. Plus, if they want to get paid like a professional, they must act



and look like one,” Miles continues.

Appearance is one thing. Understanding the technology and science behind HVAC systems is another.

“That’s why we’re always in training mode. A lot of it is on an individualized basis. Still, we bring in outside training organizations like National Comfort Institute (NCI). We do onsite training with NCI every year for [combustion analysis certification](#) and [air balancing](#).

“We also try to keep our guys up to date on the latest and best technology. For example, we bought the [MeasureQuick](#) software for our entire field team, so they don’t have to do the math anymore. That streamlines the testing and diagnosis process for the techs and allows us to collect the data we need to analyze and solve customer comfort and safety problems,” Miles continues.

He adds that one of the things he likes about the MeasureQuick app is that it produces decent system reports his team can share with clients and interfaces with his Service Titan software.

“Data goes into the customer’s records. We can trace anything down. All our calls are there. All the documentation, too. Such automation makes it a lot easier than having to search for a

physical file,” says Miles.

Other training Miles and his management team use to maintain their team’s professionalism comes from the local air conditioning contractor’s association as well as the [National Air Conditioning Contractors of America](#) (ACCA) training programs. He talks specifically about ACCA’s service manager clinics and other programs throughout the year.

Also, the Jerry Kelly Heating and Air Conditioning team takes advantage of membership in groups like [The Service Nation Alliance](#), [EGIA](#), and others. He says they use a lot of those groups for their online training.

“And we are open to new avenues of training our people,” he adds.

GETTING THE WORD OUT

Since he first began working for Jerry Kelly Heating in 1994 as a dispatcher, Steve Miles says that he was very interested in how marketing impacts a business’ growth.

“Over the years, I’ve learned that marketing works,” Miles explains. “The problem is knowing EXACTLY how it works.

“We’re up 10% over last year. We’re up 50% month-over-month from last October. Where’s it all coming from?

It’s hard to nail down who recommended us and why. Our growth is directly impacted by reputation and marketing. It all combines and gets our brand out there.”

He adds that getting the word out means being smart and strategic and tracking results.

“Marketing is essential. I consider it part of our advertising budget.”

Miles says he believes the important thing is that the company keeps an ongoing conversation with customers and potential customers. That goes beyond advertising.

“I think of it as gorilla marketing. We give away door hangers that are reusable grocery bags with our logo emblazoned on them. We include coupons and magnets inside those. Even our trucks work to our advantage. They are purple and stand out in all the neighborhoods we work in.

RECRUITING ALSO REQUIRES MARKETING

In the age of what has been deemed the ‘Great Retirement,’ it is essential to work toward attracting new talent into the business. Miles says this is part of their marketing and advertising plan as well. Interestingly, he says that most applicants come from out-



side the HVAC industry.

“We are always trying new ways to attract technical talent to Jerry Kelly,” he explains. “We target our marketing and promotions toward people who have some mechanical aptitude and also who have the right attitude.

“Then we train them both internally and send them out for technical training.” The goal is to get them up to speed on how we do things. Occasionally, we’ll hire somebody from another HVAC company, but that’s the exception.”

Again, he points out that the training includes NCI combustion and airflow classes, as well as heat exchanger training.

“Let’s face it. It’s about customer safety, liability protection, and selling comfort.”

BIGGEST STRENGTHS AND WEAKNESSES

Recruiting and training new technicians certainly counts, in Steve Miles’ mind, as a continuous challenge. But he also says the pandemic posed one of the most significant difficulties in his career in the HVAC Industry.

He shares that it didn’t cost him business – the exact opposite is true. The challenge was managing the workday and subsequent surge in business once the government deemed HVAC contractors essential workers.

“We were able to power through the masking, making customers feel safe, and providing them the best, most cost-efficient comfort they wanted,” Miles adds.

“That certainly is one of our strengths. Because of our training, we have a deep bench, and I think our team can truly guide the customer in

the right direction. Our main weakness is the expense of providing that level of training and the wages our guys deserve.

“We’re not the least expensive contractor in our marketplace, so we have to overcome the price objection more than the competitors who choose not to invest in the training for their people. Plus, we constantly battle against other contractors who badmouth us by saying we overcharge customers.

“Our approach is that if a customer has a complaint, our job is to resolve the issue. By taking care of your customer, everything else will fall into place.”



THE SECRET SAUCE

In 2019, we profiled Jerry Kelly Heating and Air Conditioning on these pages because they focused on professionalism, training, and putting the customer first. Back then, they offered customers a 100% satisfaction guarantee, or they got their money back. Those three components remain at the heart of this company’s continued growth and success.

Over the years, the company achieved several important national recognitions, including one of *Contracting Business* magazine’s *Contractors of the Year*, the Service Nation Alliance Contractor of the Year, and other local recognitions.

This year, Steve was inducted into *Contracting Business* magazine’s *Hall of Fame*.

Miles adds that there are other ingredients in the secret sauce of his firm’s success. He lists them as:

◆ **Joining industry groups** – “Why? Because you don’t know what you don’t know,” He says. “The sessions and topics are always intriguing, but the real value is in the social activities after the concurrent workshops. Peer-speak is just so valuable. I cannot stress that enough.”

◆ **Don’t try to implement everything you learn all at once** – “You should just pick one or two things you learn at industry events, then follow them through to the end. Either they work, or they don’t. You either keep them or throw them away and then start over with something else.”

◆ **Membership organizations offer many bonuses** – “Our membership in groups like NCI changed our technical problem-solving approach. It taught us the truth about airflow, system performance, and understanding that the entire house is a system.

“We use that every day. From using flow hoods to blower doors, we can show customers how we determine what they need. It’s not always easy to get customers involved when we are testing, but the NCI charts and tables make it easy enough to help customers better understand what you are doing and the value you provide.”

It is for these and many other reasons that the team at *High-Performance HVAC Today* magazine once again chose **Jerry Kelly Heating and Air Conditioning** as a company to spotlight. Congratulations to Steve Miles and his entire team.



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National Comfort Institute, Inc.
Bill Spohn, P.E., TruTech Tools

Monday, January 22 • 1:00 -2:00 pm

Airflow Measurement: Old School Meets Latest Tech

Speakers: David Richardson,
National Comfort Institute, Inc.
Chris Hughes, The Energy Conservatory

Monday, January 22 • 3:00 -4:00 pm

How to Sell High-Performance HVAC

Speakers: Dominick Guarino, President,
National Comfort Institute, Inc.
Dawn Mroczek, GV's Heating
and Air Conditioning

Tuesday, January 23 • 9:00 -10:00 am

Benefits of Modern-Day Combustion Safety Testing: Real-time vs Steady State

Speakers: Casey Contreras,
National Comfort Institute, Inc.
Tyler Nelson, Sauermann Americas

Tuesday, January 23 • 10:30-11:30 am

Where Home Performance Meets HVAC Design

Speakers: David Richardson,
National Comfort Institute, Inc.
Adam Mufich, A-Team Heating
and Air Conditioning

Wednesday, January 24 • 9:00-10:00 am



NOTE: All Sessions Will be Held in the South Building, Level 4 Room S405b.

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December 5-7: Richmond, VA
December 12-14: Austin, TX
December 12-14: Jacksonville, FL

Airflow Testing and Diagnostics

January 16: Waller, TX

Duct System Optimization and Air Balancing Certification Program

January 16-18: Austin, TX

PUBLIC LIVE TRAINING (cont.)

Duct System Optimization Certification Program

January 17-18: Waller, TX

PUBLIC ONLINE LIVE TRAINING

Commercial System Performance Certification Program - ONLINE LIVE

December 12-13: *Part 1*
December 19-20: *Part 2*

Combustion Performance and Carbon Monoxide Safety Recertification Program - ONLINE LIVE

January 9-10

Residential HVAC System Performance Certification Program - ONLINE LIVE

January 16-17: *Part 1*
January 23-24: *Part 2*

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Commercial Air Balancing Certification Program

January 9-11: Anaheim, CA

Performance-Based Selling Bootcamp

December 12-14: Anaheim, CA

Duct System Optimization & Residential Air Balancing Certification Program

January 16-18: Anaheim, CA

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ncilink.com/TECHCleanCA

High-Performance HVAC Design and Redesign

December 5-7: Anaheim, CA

Residential HVAC System Performance & Electrification

December 19-21: 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 to view the latest schedule.

High-Performance Branding for High-Performance HVAC Contractors

As a High-Performance HVAC contractor, you do things differently than other contractors. That gives you an edge, but only if you can communicate those differences to prospective customers. It boils down to message, media, and motivation.

THE MESSAGE

You know what makes you different from other contractors. You know how to make all rooms in a home comfortable at the same time. You know how to improve air quality. You know how to balance temperature and humidity. You know how to reduce energy usage, which reduces out-of-pocket utility costs and carbon footprints. So, how do you communicate all of that?

We live in a sound bite society. Unfortunately, much of high-performance contracting does not lend itself to a soundbite world. Consider reducing your message to the identification of problems you can solve:

- Hot spots or cold spots in your home? We can fix them.
- Problem room? We can make it comfortable.
- Clammy feeling? We can optimize your humidity.
- High utility bills? We can lower them without replacing your expensive air conditioner.

If you need to communicate in soundbites, questions are a good way to get people's atten-

tion. Once you have their attention, you are in a better position to discuss solutions.

Alternatively, you can seek venues where you have more time to discuss performance contracting or even demonstrate it.

The objective is to communicate what you can do that differs from the way other contractors approach HVAC. Unless you are speaking with an engineer, do not get trapped in technical discussions. Instead tell stories.



Story-telling is baked into our DNA. It's how we learned survival skills and retold history since the dawn of mankind.

THE POWER OF STORIES

A story has a beginning with a protagonist (e.g., a customer). It has an obstacle that must be overcome (e.g., a specific comfort problem), a journey to get past the obstacle and take the

protagonist to a successful conclusion and a happy ending.

Think of half a dozen stories with different obstacles that represent your capabilities. People remember stories. People have been using stories to communicate since the dawn of time.

Before we had a written language, we would sit around the fire and listen to stories from our tribal elders. These were stories about dangers to avoid. They were stories about finding food. They were stories about healing illnesses and injuries. They were stories about survival.

Storytelling is baked into our DNA. What are your stories?

Stories are not the only way to communicate.



Different manufacturers have used water tables in the past to illustrate airflow. With a little creativity you can do the same. When appropriate, controlled demonstrations are a powerful means of communication.

THE MEDIA

Media encompasses more than broadcast television and radio. It includes cable, Internet radio, your website, Internet advertising, search engine marketing, outdoor advertising (including your trucks), direct mail (including newsletters), public speaking opportunities, home-and-garden shows, and so on.

With any media, the goal is to find a vehicle that reaches your target audience for the most affordable price. Start by defining your target. Most contractors focus on homeowners, age 35 and over. Some may select an older demographic believing that older homeowners are more likely to have disposable income and more willing to pay for higher end services.

Many focus on women because the marketing research shows that women influence seven out of eight HVAC replacements as well as most service calls. Ask yourself, who calls your

company? Who answers the door when you arrive at the prospect's home? This is your target.

BROADCAST MEDIA

Broadcast media can work well in smaller markets but tends to over-reach in larger metro areas. It does you little good if you are speaking to a prospect 30 miles outside of your service area.

Cable, on the other hand, allows more precise targeting down to the zip code level. It is also highly affordable. The same is true for Internet radio options, such as [Pandora](#), [I-Heart Radio](#), etc.

If you decide to go cable or Internet radio, try to envision what stations your target customer watches or listens to. You may be thrilled to see your ads on a sports channel, but you might be more effective on one of the home improvement or cooking channels.

You might find better luck targeting Christian or soft rock radio than talk radio. It all depends on your target customer.

DIGITAL MEDIA

There is a lot of focus today on digital, and rightly so. However, the same

ROI focus should be applied to digital media that applies to other media. Focus paid search on the key problems you can solve to keep costs low and results focused.

Search engine optimization for your website should also stress the things that differentiate your approach, but from the consumer's perspective. Do not expect consumers to search for technical terms, but for problems and solutions.

TRADITIONAL DIRECT MARKETING

Ironically, the focus on digital and subsequent shift away from traditional forms of direct marketing has made direct more attractive.

One of two options high-performance contractors should consider includes **radius marketing**. This is where you mail to some number of homes surrounding your customer with a note about the problem the customer experienced and how you solved it. Chances are good that others will share the problem.

The other form of direct marketing that works for high-performance contractors is **consumer newsletters**.

A [newsletter](#) gives you the space

BRAND

and word count necessary to better explain what you do that makes you different. By making the newsletter interesting with a little information on your high-performance services, readership will be better.

You do that by including a recipe, a crossword puzzle or Sudoku, and items about your local community. Mail the newsletters quarterly and include a special offer in each issue.

OUTDOOR DIRECT MEDIA

The best option for outdoor advertising are your vehicles. Pay to get them wrapped in any color but white. Be bold. Be clean. Use a professional graphics designer to help you with your [truck wrap](#).

This is mostly a focus on brand. Trucks get more than 30 thousand exposures a day. A good wrap will raise brand awareness and familiarity that makes you a safer and familiar choice when viewing your other marketing.

HOME SHOWS

Visit the next [home and garden show](#) as a consumer. What gets your attention? Chances are it is not a booth with Company XYZ's name across the top. You will be interested in problems and solutions that speak to you.

This will be especially important for high-performance contractors. You are not just another HVAC company, but you will get viewed that way if you fail to differentiate yourself.

Follow the same advice given above and ask about a problem. Once people enter your booth, be prepared to talk about stories and/or give demonstrations. In a home show, demonstrations are especially effective.

SPEAKING OPPORTUNITIES

Do not overlook the opportunity to speak on home performance in your community. Every **service and civic club** is looking for speakers, week in and week out.

Many **homeowners' associations** feature speakers at their meetings. Corporations that have brought people back to the office hold "**lunch and learns**."

Almost all of these will involve putting together a tight 15-to-30-minute canned presentation on high-performance contracting. This is an ideal environment to open by discussing what it is and how it is different.

Use stories as illustrative examples. Close with information on how to find a High-Performance HVAC contractor. Remember, you are speaking to the process and solutions, not advertising for your company. The promotion is inherent.

You should be a member of a local service club. Get on the program rotation. Rotary and many other clubs use speakers' bureaus. Do some Internet sleuthing and find them online.

THE MOTIVATION

One problem you face with potential customers is how much motivation they need to decide and act. Many people live with problems because they are unaware that there is a solution. Even then, when presented with a solution, they often have no urgency to act now. This is why you create urgency with sales, specials, buy one/get one, and so on.

Track your promotions to run counter season. When things slow down, your promotions and offers should pick up. These should not take away

from your profit but should be built into your pricing as part of your marketing budget.

Some high-performance contractors tend to look sideways at marketing promotions as though they devalue their service. Nonsense. Promotions are nothing more than reasons to act now instead of waiting. People are subject to inertia. Absent an outside force, they will not act. Promotions are the outside force.

TIMING

When marketing fails, it is because it is either the wrong message, wrong media (or audience), wrong motivation, wrong timing, or some combination. You can control the message, media, and motivation. You can tweak them and adjust them.

Timing is beyond your control. This is why marketing should be done all year long. True, you pick it up during predictable seasonal slowdowns, but you should never stop.

Marketing your business is a lot like pushing a dead car in neutral gear. It takes effort to get it rolling, but less effort to keep it rolling once it starts. If you let it roll to a stop, it will take more effort to get it rolling again, so do not stop marketing. Ever. 



Matt Michel is a member of the **Contracting Business Hall of Fame** and a recipient of the **Air Conditioning Heating & Refrigeration NEWS' Legends in HVACR** award.

For newsletter and other marketing ideas, consider supplementing your [National Comfort Institute membership](#) with a membership in the Service Roundtable. Learn more at www.ServiceRoundtable.com. Matt can be reached at mattmichel@mail.com or 214.995.8889.



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Make Combustion Safety Part of Your Brand

Safety is often NOT a key differentiator when it comes to standing out from the crowd. It's not because HVAC contractors don't care about safety. The fact is, in most cases, the exact opposite is true. But most contractors don't tout safety as part of their market brand.

They are missing an essential feature of their overall business approach. Safety should be critical to a company's overall branding and reputation approach. For my team at [Masterworks Mechanical, Inc.](#), in Craig, CO, we focus on training to test and diagnose safety issues. That is central to our brand.

We have 14 technicians trained and certified in [combustion analysis and carbon monoxide safety](#). We have several new technicians scheduled for training. Everyone who works in the field gets trained.

SAFETY BRINGS CUSTOMER TRUST AND CONFIDENCE

Having highly trained and even certified technicians coming into a home enables customers to see them checking gas-fired equipment for signs of rising carbon monoxide (CO) levels, which gives them a good feeling.

Several years ago, I read a book called [Blue Ocean Strategy](#) that discussed how companies can provide products and services with little or no competition. Doing this allows them to charge enough to be profitable, grow their businesses, and take good care of their employees.

For me, combustion safety is how I get to my blue ocean. It is how our team helps customers trust and have confidence in what we do.

Our service area covers 45 miles in all directions from Craig. You would need to double that

area before you find another contractor who knows anything about combustion or CO safety. Our approach to combustion safety completely separates us from our competition.

We always perform a combustion analysis for every gas appliance we service or any new installation we do. Customers who hire us get something that they couldn't buy anywhere else.

That is the keystone of our company.

WE EMPHASIZE TRAINING

The training our team receives also protects them. We spend a lot of time with installers and service techs to look for visible signs of problems. For example, let's say they're working on a furnace. They know to follow that vent pipe out of the room to see what else, if anything, is attached to it.

The idea is to NOT just look at the furnace but to consider all gas-fired appliances in the home. What is their impact on any potential danger from CO production.

We want everything to operate safely.

PROFESSIONALISM AND RELIABILITY

Another part of our brand is how the team looks and acts. These two things impact [your customer's first impressions of your firm](#).

We often hear from customers about how our field techs are the type of people they'd invite over for dinner. And that is by design. We want our technicians to look and act like professionals. We want customers to feel comfortable inviting them into their homes. We also have a drug-free program. If technicians want to work for us, they must pass those tests.

It changes the group of people we work with.

Our professional approach is also a part of our



preventive maintenance (PM) program. We include changing the battery in the low-level CO monitor as part of our PM checklist. If the customer doesn't have a monitor, we explain why they should.

Then we do a combustion test on every PM service. When we finish our work, we send them our complete preventive maintenance form so they have something in writing that explains what we did and what we found.

To better help them understand the results of our analysis, we use colored boxes to reflect their CO status. A green box means all is well. A yellow box means there isn't an emergency, but they should consider taking some action. And a red box means we shut down the furnace because it poses an imminent danger.

CO MONITORS VERSUS CO DETECTORS

On every service call, our technicians will explain the importance of having a low-level CO monitor in their homes. Typically, the customer responds with, "Oh, we already have a detector."

Our guys know to tell them that detectors are government-regulated and can't alarm until harm is already done. On the other hand, monitors measure much lower CO ranges in the air, which alerts consumers before harm can be done. When it comes to equipment installations and replacements, we get past this argument by always installing a low-level CO monitor as part of our service.

Our salespeople always include a low-level monitor with the bid, and we put one in every time we do anything with gas-fired equipment.

In addition, at **Masterworks**, we always buy a few low-level monitors every year to keep around as loaners. Let's say a customer is buying a furnace, but it won't come in for two weeks, and something sketchy is happening with the old one. We'll leave one of our loaner monitors to ensure CO isn't being produced in rising numbers.

EMPLOYEE MORALE AND PRODUCTIVITY

Another thing I want to say is the importance of networking and having others in the industry available for advice. I was lucky to have people like Tom Johnson to help me incorporate combustion testing into our daily routines. He and other advisors were great for making us do all the right things. But I was worried about whether it was "taking" properly.

That worry was put to rest when I found our guys returning from service and installation jobs talking about CO numbers, or things they caught that other HVAC companies would miss. Their morale was sky-high. That's when I knew it was working. Combustion success stories became part of our team's daily conversations.

Typically, when a company wants to

make changes, the orders come from top management and are fed down to the workforce. When those changes are fed from the bottom to the top, that's when you

know you've got a program that's up and running successfully. When that happens, our team's productivity soars.

COMMUNICATING YOUR BRAND

Our biggest advertising and marketing spend is on our vehicles. Everybody recognizes them because they're the only maroon fleet on the road. That's what keeps us going. We base much of our marketing on word of mouth. People know Masterworks because they've seen our trucks and the quality of our work. I think it's safe to say that we have safety baked into their culture.

Our customers and the community we serve see our company differently — the more people in your community who know your brand, the better. I read somewhere that studies show businesses with a strong safety culture are generally better equipped to handle challenges and changes.

Safety enhances customer trust and confidence, improves employee satisfaction, and creates overall business success. **NCI**



Vic Updike and his wife Amy own Masterworks Mechanical LLC of Craig, CO. Vic has worked in the HVAC Industry as a technician, service manager, as well as other positions for more than 30 years. If you'd like to

learn more about their CO culture, reach out to him at ncilink.com/ContactMe.

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Dual-Fuel Heat Pumps: Meeting HVAC Customer Demands

In the ever-evolving world of comfort solutions, HVAC contractors face new challenges and opportunities. Customers are increasingly seeking energy-efficient and eco-friendly options to meet their heating and cooling needs while addressing concerns about rising utility costs, fluctuating energy prices, and potential power outages.

Although heat pumps have gained popularity for their environmental benefits, many customers remain skeptical about their performance in cold weather. This is where dual-fuel heat pumps come into play, offering HVAC contractors a versatile solution to cater to the evolving demands of customers.

ADDRESSING CUSTOMER CONCERNS

Homeowners often harbor reservations about heat pump systems due to their perceived ineffectiveness in cold weather. When heat pumps first gained popularity in the 1970s, they were unable to heat efficiently in below freezing temperatures.

Many heat pumps available today have much better cold weather performance, but homeowner misconceptions persist.

Additional concerns include the potential for perceived lower comfort due to lower supply air temperatures, higher utility bills, uncertain future electricity costs, and worries about heating during power outages.

As HVAC contractors, it's crucial to acknowledge and address these concerns to provide effective solutions for homeowners.

THE BENEFITS OF DUAL-FUEL SYSTEMS FOR CONTRACTORS

Dual-fuel heat pumps can be a game-changer for HVAC contractors, providing several advantages:

- 1. Diverse Solutions:** Offering these systems allow you to provide solutions that cater to various customer preferences and concerns, making your services highly appealing for discerning homeowners who appreciate versatility.
- 2. Customer Satisfaction:** Dual-fuel systems ensure customer comfort and peace of mind. The gas furnace acts as a reliable backup in situations where the heat pump may fall short, such as during extreme cold weather or power outages. During a power outage the furnace can be operated with a small generator or modest backup battery.
- 3. Pricing Flexibility:** Dual-fuel systems enable you to provide cost-effective solutions that can compete with traditional furnace and air conditioning setups, depending on existing equipment and local climate conditions. This adaptability can appeal to budget-conscious customers. Leveraging the furnace for cold and very cold temperatures can also allow for more aggressive downsizing of the heat pump, potentially avoiding costly electrical system upgrades.
- 4. Climate Resiliency:** In an era of climate change, extreme weather events, including severe cold spells, are becoming more common. Dual-fuel systems offer climate resiliency, ensuring that homeowners stay warm even during extreme cold snaps or power outages caused by natural disasters.

GUIDING CUSTOMERS TO THE RIGHT DUAL-FUEL SYSTEM

When helping customers choose a dual-fuel system, consider their specific needs:

- **Upgrading Existing Furnace:** For relatively new furnaces (under 10 years old) with single-



speed fans, consider recommending high EER single-stage heat pumps that match the fan's capabilities. Avoid pairing older furnaces with multistage or variable capacity heat pumps, as this could significantly reduce the SEER advantage of the system. An external controller with an outdoor changeover sensor may be necessary for older systems.

- **New Multistage Communicating System:** If the customer's existing furnace is outdated or requires replacement, suggest a multistage communicating dual-fuel system. These systems are designed to work seamlessly, offering superior control over both the compressor and blower. It's essential to match these systems properly to benefit from manufacturer support and warranty coverage.
- **New Inverter-Driven Communicating System:** Customers seeking top-tier efficiency and advanced technology may prefer an inverter-driven communicating

dual-fuel system. These systems incorporate variable-speed inverter-driven compressors and high-efficiency variable-speed fans, resulting in outstanding SEER ratings. These systems often operate efficiently at very low temperatures, reducing reliance on the gas furnace.

EXPLORING DUAL-FUEL HEAT PUMPS IN DEPTH

To grasp the advantages of dual-fuel heat pumps, let's delve deeper into their components and considerations.

◆ **Components of Dual-Fuel Systems:** Dual-fuel systems consist of two main components: an **electric heat pump** and a **gas furnace**. The heat pump is responsible for primary heating tasks by extracting heat from the outdoor air and transferring it into the home efficiently.

However, during extremely cold weather or power outages, the gas furnace takes over to ensure consistent warmth. The furnace fan is responsible for moving air through the

indoor heat pump coil and ducts into the home.

Another key component is the **controls** that allow the furnace and heat pump to work together. These controls must tell the system whether to operate cooling, heat pump heating, or furnace heating.

To determine whether to operate the heat pump or furnace, most controls will use outdoor air temperature.

The controls also need to tell the fan what stage to run the cooling or heating in and what speed to run the fan to match the compressor or furnace operation. This is where you need to be careful about matching heat pumps with a furnace.

If a customer is going with a brand-new furnace and heat pump, it's easy to find a matched set that will communicate properly and just work. Whether the customer wants to go with a more traditional single- or two-stage system, or a fully modulating inverter system depends on their objectives and budget.

For a more traditional offer, look for a single-stage heat pump that lists furnaces as compatible options for the indoor coil. A brand-specific thermostat will typically be required to ensure the two work together in the field.

At the higher end, systems like the **Daikin FIT** or **Lennox XP25** offer dual fuel capability, sophisticated controls, and some of the highest efficiencies on the market.

If you're adding a heat pump to an existing furnace, things get a little trickier.

The best option for a newer furnace would be to try to find a heat pump that is matched to the furnace by the manufacturer. If the furnace has a multiple- or variable-speed fan, it may be a good candidate for a universal dual-fuel setup like **Mitsubishi's intel-li-HEAT system**. It will work with most furnaces, but will not achieve its full efficiency potential when combined with a furnace that only has a single- or two-speed fan.

Systems like these include controls for the indoor unit that tell the fan what speed to run in based on the heat pump operation, in addition to determining when to operate the furnace.

Lastly, if you have an older furnace with a single- or two-speed fan, the best option is to stick with a single or two-stage heat pump with an external dual fuel controller such as the

iO HVAC Controls Dual Fuel Kit.

This kit can control up to two stages of cooling and four stages of heating (two heat pump stages and two furnace stages) and includes an outdoor thermostat for setting the changeover temperature.

the heat pump's efficiency declines, the system automatically switches to the gas furnace.

This transition guarantees homeowners reliable heating even in extreme cold weather.

The science of optimizing dual-fuel changeover settings can get quite sophisticated, and all sorts of variables could come into play including heat pump sizing relative to design loads, detailed performance ratings across temperatures, local gas versus electric prices, etc.

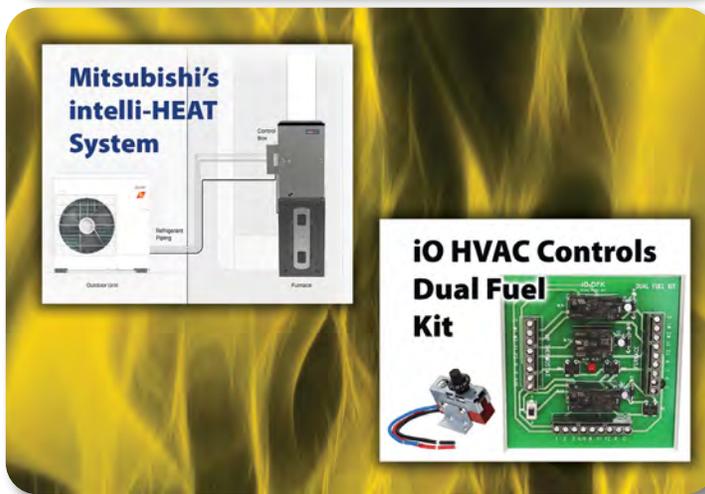
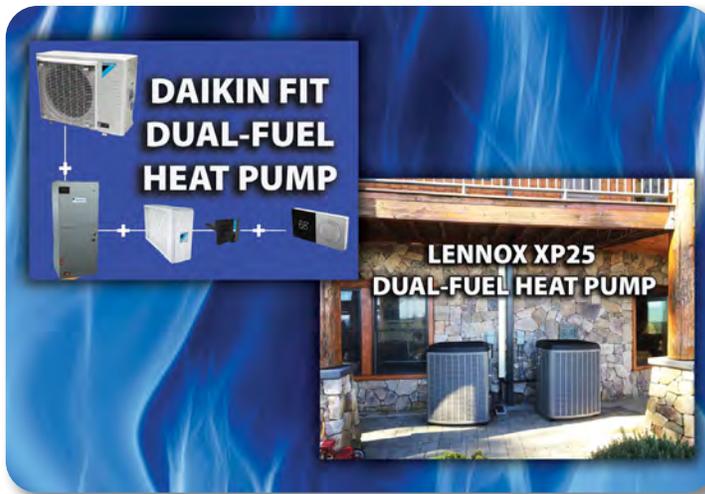
I would expect to start seeing dual fuel controls that can optimize for comfort, economy, or even greenhouse gas emissions as controls and the grid get smarter with more communication capability.

Today, a practical way to get a great changeover setting on a standard heat pump would be to set it at 25°F or so and teach the customer to increase it a bit if they get cold.

For a set-it-and-forget-it option for less savvy customers, a 35°F changeover is a pretty traditional and fool-proof place to start.

On an inverter system or a cold weather heat pump, it would be best to consult the manufacturer detailed performance tables to get an idea of the temperature range at which capacity and efficiency start to drop off.

◆ **Enhancing Energy Efficiency and Cost Savings:** Dual-fuel systems offer homeowners the flexibility to manage their energy costs effectively. As energy prices fluctuate, users



◆ **Addressing Cold Weather Concerns:** A primary concern regarding heat pumps is their performance in cold temperatures.

While special cold weather models exist today that can eliminate this issue in all but the coldest climates, dual-fuel systems are perhaps even more reliable. When the outdoor temperature drops below a certain point, where

can select either electricity or gas as their heating source.

When electricity is cost-effective, the heat pump can be used, while the gas furnace takes over when gas prices are more favorable. This adaptability empowers homeowners to make cost-effective choices, potentially reducing their energy bills.

As alluded to above, I expect that in the future real-time pricing signals from utilities could automate operation for the lowest costs. I'm not aware of any solutions to automate these decisions currently, so you or your customer would need to do some due diligence on heat pump and furnace efficiencies and utility rates to find the best change-over strategy for cost optimization.

◆ **Reliability During Power Outages:** Another common concern is the potential loss of heating during power outages. Dual-fuel systems excel in this regard. As stated earlier, the gas furnace can be operated using a small portable generator or a battery backup.

In contrast, a standard heat pump would require a larger whole-home generator or an extensive solar and battery setup to function during power outages.

With a plan for the small amount of backup power required, dual-fuel systems ensure that homeowners remain warm and comfortable even when the power grid fails.

◆ **Thinking Beyond the Box:** As with any HVAC system, a dual-fuel heat pump is only as good as the actual installation and the system it is installed in. But there are some special circumstances to consider for dual fuel specifically.

Special attention needs to be given to duct sizing because heat pumps

typically require more airflow per Btu than furnaces. Existing ducts may be a limiting factor on the heat pump capacity selected.

Dual fuel allows you the option to put in a smaller heat pump than what is required to heat the home on the coldest days, potentially avoiding the need to upsize ducts. Of course, a duct renovation is always an option and can add valuable high margin work to the scope.

With increased complexity compared to furnaces alone or furnace and air conditioning systems, twice yearly maintenance is critical to keeping a dual-fuel system operating reliably for years to come. With the increased maintenance required, dual-fuel systems are prime candidates for maintenance contracts, a valuable source for recurring revenue for contractors.

THE FUTURE OF DUAL-FUEL HEAT PUMPS

As the demand for sustainable and energy-efficient heating and cooling solutions continues to grow, dual-fuel heat pumps are positioned to play a significant role in the HVAC industry.

These systems offer contractors the opportunity to provide versatile solutions that address concerns related to cold weather performance, utility bills, and power outages.

Moreover, as the energy landscape evolves, dual-fuel systems provide the flexibility needed to adapt to changing energy prices and requirements.



A WINNING PROPOSITION FOR CONTRACTORS

In conclusion, dual-fuel heat pumps are not just a solution to address customer concerns but also a strategic opportunity for HVAC contractors. By offering versatile and efficient systems, contractors can differentiate their business and tap into a growing market for eco-friendly heating and cooling solutions.

In a world where energy efficiency and environmental responsibility are paramount, dual-fuel heat pumps stand out as a reliable and adaptable solution. By guiding your customers to choose the right dual-fuel system for their specific needs, you position yourself as a forward-thinking contractor who can provide effective solutions that align with both customer demands and the industry's ever-changing landscape. 



Ben Lipscomb, P.E. has more than 16 years of experience in the HVAC industry, including laboratory and field research, Design/Build contracting, and utility energy efficiency program design. He is National Comfort

Institute's director of engineering and utility programs and may be contacted at ncilink.com/ContactMe.



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NCI AT AHR: IT'S ABOUT THE EDUCATION



The [AHR Expo](#) is nearly upon us, and your National Comfort Institute (NCI) team will be there in force. The expo is

the HVAC Industry's largest trade show event that brings together manufacturers, suppliers, and contractors of all sizes and specialties.

Besides showcasing the latest in products and technology, AHR Expo also holds concurrent workshops and educational sessions that we highly recommend you attend if you plan to be in Chicago this January.

AHR Expo will be held at McCormick Place in Chicago from January 22-24, 2024. NCI trainers and partners will not only be exhibiting (**see us in the South Building, Booth #S9043**) but will also lead five free educational seminars and participate in a leadership panel.

Here is the breakdown of their events. **All NCI sessions will be held in the South Building, Level 4, Room S405B:**

- **Climate Resilient HVAC: Where the Rubber Meets the Road** – Presented on Monday, January 22 at 1:00 PM by **Ben Lipscomb, P.E.**, National Comfort Institute and **Bill Spohn, P.E.**, TruTech Tools. Ben and Bill will delve into the crucial concept of [Climate Resilient HVAC systems](#), which are essential for ensuring the safety and comfort of occupants amid increasingly unpredictable and escalating climate extremes.
- **Airflow Measurement: Old School Meets Latest Tech** – Presented on Monday, January 22 at 3:00 PM, by **David Richardson**, National Comfort Institute, and **Chris Hughes**, The Energy

Conservatory. They will share timeless principles of [airflow measurement](#) and how the latest technology makes it easier to measure.

- **How to Sell High-Performance HVAC** – Presented on Tuesday, January 23 at 9:00 AM by **Dominick Guarino**, National Comfort Institute, and **Dawn Mroczek**, GV's Heating & Air Conditioning. This session will focus on what it takes to be a [High-Performance Contractor](#) and how to use this differentiation in your marketplace. Dawn and Dominick will show you what it takes to service, sell, and design system installations that are safer, healthier, more comfortable, and more energy efficient than the typical system.
- **Benefits of Modern-Day Combustion Safety Testing: Real-time vs Steady State** – Presented on Tuesday, January 23 at 10:30 AM by **Casey Contreras**, National Comfort Institute and **Tyler Nelson**, Sauermann Americas. Join Casey and Tyler as they reveal the benefits of [modern-day combustion testing](#) and how you can take advantage of new technology. You will learn the differences between steady-state and real-time measurements and how to use them to test, diagnose, and repair hidden safety and efficiency issues.
- **Where Home Performance Meets HVAC Design** – Presented Wednesday, January 24 at 9:00 AM by **David Richardson**, National Comfort Institute, and **Adam Mufich**, A-Team Heating & Air Conditioning. In this seminar, David and Adam will show you a systematic approach to testing and diagnosing common problems resulting from conflicts between the building and the HVAC system. You'll learn to examine the connection between [building performance and HVAC design](#) and

explore what might be missing and how to take advantage of it.

In addition, NCI's Dominick Guarino will participate in the **HVACR State of the Industry Leadership Panel** discussion entitled "Today's Market, Challenges, Opportunities, and What's Ahead." The panel takes place on Tuesday, January 23, at 10 AM.

We hope to see you there! [Register now](#) for free through January 20, 2024.

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And while you are at it, ask about NCI membership and all the benefits it provides.



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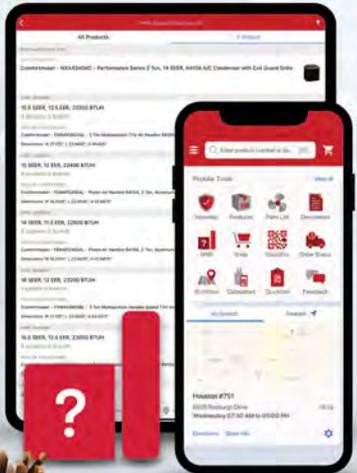



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10 Ways to Protect Your Brand and Deliver High Performance in 2024



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

This month's issue focuses on branding, and you'll find several great articles on the subject. An important part of a strong image is how you treat customers before, during, and after a sale or service call.

While by no means exhaustive, the following list can help you maintain a **stellar brand** and **reputation** that will help you keep good customers and acquire new ones:

1. Performance test every system your company touches. Basic testing of **temperatures, static pressures, and airflow** should be your standard on every maintenance and service call. Your salespeople should also test every system they look at.

opportunities to sell safety improvements.

3. Show up on time and don't postpone. Whether on a service call or an estimate, there is nothing more aggravating than a tech or a salesperson not showing up on time. It sends a signal that the customer is not that important to you. A close second is postponing – especially more than once. Sometime this can't be avoided.

The key is good, timely communication to reduce customer inconvenience.

4. Verify Performance on all your installations. While initial testing is important, testing after an install or renovation is even more critical. This is where many miss the opportunity for wowing the customer.

Final verification that you did what you promised closes the loop and leads to increased satisfaction and referrals. Don't skip this step!

5. Train field technicians to respect customer property. There is nothing worse than dripping oil in the driveway or to have customers find your installer's tools laying all over their washer and dryer - or other furniture.

Not only does this set you up to have to make it right, it negates the good will you are trying to build. This needs to be taught and reinforced. It is easy to get so focused on the work and forget that the customer's home is not a construction site.

6. Perform a quality check on every installation. This step will also reduce callbacks and unhappy customers. I just had a master bathroom remodeled and the contractor had to come back five times to make everything right – and there are still some issues that should have been caught the first time!

Even though they did a decent job, I won't refer them to my friends or family. **NCI**

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ADVERTISE AND TEACH YOUR CUSTOMERS ABOUT THE IMPORTANCE OF WHAT YOU DO DIFFERENTLY THAN MOST OF YOUR COMPETITION – AND WHY!

Our industry has never before had better tools and software available to make testing easy, fast and accurate. Be sure to equip your field people with the right tools. Not only will that help you reduce callbacks, your techs will uncover opportunities to upgrade customers' comfort systems like never before.

2. Help keep customers healthy and safe. Do your field people perform carbon monoxide (CO) safety testing on every service call or installation? If not, you not only expose your company to liability, you could inadvertently endanger your customers' health – or worse.

Combustion Analyzers have come a long way in terms of affordability and ease of use. Make sure your techs have the tools and certification training to keep your customers safe and uncover

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