

HIGH PERFORMANCE HVAC TODAY™

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

HIGH PERFORMANCE CONTRACTING:

From Tradesmen... to Craftsmen

Becoming a Performance-Based
Contractor™

Don't Miss Fall IAQ Opportunities

19 Attributes of a Great Leader



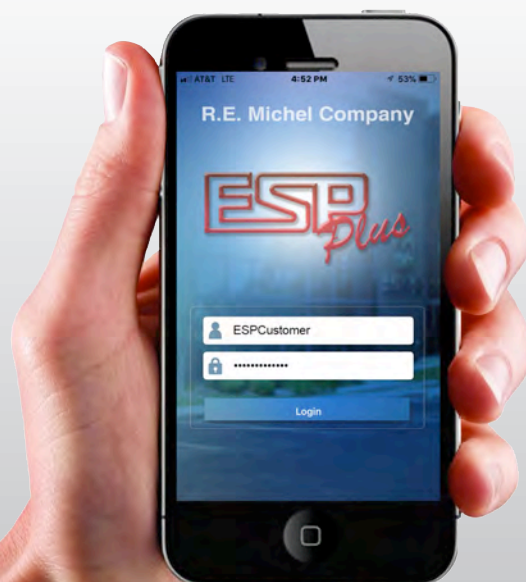
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NOVEMBER 2017

VOLUME 1, NUMBER 1

HIGH PERFORMANCE HVAC TODAY™



LEAD GENERATION:

Indoor Air Quality Opportunities

Rob Falke shows how Performance-Based Contracting™ can bring in leads during shoulder seasons when weather isn't much of a factor.

20

SALES:

The Habitual Buyer

What does this mean? Entrepreneur Rodney Koop examines how customers make buying decisions to help you sell more effectively.



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CUSTOMER SERVICE:

Don't Let Cold Winter Make You Forget

A large backlog of emergency service calls is both a blessing and a curse. Here's why and what you can do about it.

LEADERSHIP:

19 Attributes of a Great Leader

In the world of Performance-Based Contracting™, you are the leader in your business and most likely in your marketplace. Are you a good one or a great one? Check this out.



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Monthly Download

This month we provide a technical tip or two to help you when **Installing Vertical or Bullhead Barometrics**.

-- This download helps by outlining



two configurations for installing double-acting gas barometrics when you are replacing drafthoods on hot water heaters. It defines the differences between these

configurations and provides tips on how to avoid issues when there are internal exhaust fans in the building.

To download, go to ncilink.com/md1117, or point your phone at the QR Code.

By registering for free on NCI's website, access this download and many more.



BLOG POSTS

DEBUNKING HVAC MYTHS

When it comes to the HVAC Industry from a consumer's perspective, there seems to be a lot of mis-information about how to manage and maintain comfort



WEIL I'VE GOT YOUR ATTENTION...

NATIONMike Weil RT INSTITUTE

systems. These tidbits of mis-information come disguised as "truth" when actually they are more like myths and urban legends. In his most recent blog post, Mike Weil examines seven HVAC Myths and debunks all of them. Read it here: <http://ncilink.com/Myths>.



THREE TIPS TO IMPROVE STATIC PRESSURE MEASUREMENTS

Based on the input of technicians who have taken static pressure measurements for years, here are three tips to help improve your speed when doing the same. Blogger David Richardson shares these three tips and explains what type of tools you need, what processes are necessary, and what the purpose is behind everything that Performance-Based Contractors™ do. Read it here: <http://ncilink.com/FastSPMeasure>.

Online University

For those of you who look for more than just in-person training, National Comfort Institute, Inc. (NCI) offers online training that focuses on several areas of concentration:

- NCI-specific training on testing and measuring HVAC systems with an emphasis on performance-based results.
- Exclusive NCI soft skills and business training necessary for the successful implementation of performance-based systems in the HVAC contractor's business.
- Basic HVAC training to help prepare students for various NATE certifications and more.

Featured this month is the NCI-Specific Sizing Filters module where students will learn four easy steps to determine the size and numbers of filters necessary to function properly in an HVAC system. You'll learn the difference in airflow through different types of filters, as well as how to check filter impact on static pressure. ncilink.com/ou1117



Consumer Sites

MYHOMECOMFORT.ORG

Did you know that consumers have a resource they can turn to for information about the HVAC systems and the Perfor-

mance-Based Contracting™ approach to keeping those systems working at their peak? Well there is: check out <https://www.myhomecomfort.org>.

Consumers go there to learn how performance helps guarantee their



comfort, safety, energy efficiency, and health. It includes a section on [How to Find a Certified Professional](#) which lists all the HVAC contracting firms that have been trained and certified in HVAC Performance.



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TODAY'S WORD

By Mike Weil

Let Me Introduce to You: High Performance HVAC Today

Today is the birthday of something new, something unique, and something that gives voice to the Performance-Based Contracting™ Industry. It is **High Performance HVAC Today** magazine.

Though this publication is new, the messaging it will provide is not -- it is more than 25 years in the making. It is targeted to those HVAC contractors who want to deliver true performance to their customers. A Performance-Based Contractor™ delivers comfort, safety, and energy efficiency using proven documented results.

OK, so what does this really mean? Simply put, Performance-Based Contractors rely on airflow, pressure, and other measurements to diagnose HVAC system problems and identify solutions. Once the problems are resolved, the contractors repeat the measurements taken initially to prove the system is working as promised. This is known as HVAC system performance.

There are many in the industry today who tout "home performance" as the same thing. It is not.

HOME VS. HVAC PERFORMANCE

Home performance is all about the structure of the home and the mechanical equipment. It focuses on building pressurization and depressurization, windows, insulation, roofs and more. Don't get me wrong -- that stuff is important. But it is not the total answer.

HVAC performance is all about how the equipment and the ductwork work together, *along with* the influence of the building or home. Contractors can replace equipment with high efficiency furnaces, air conditioners, and heat pumps, but that doesn't mean air delivered into the space is comfortable or energy efficient. If we don't, as an industry, consider the ductwork --

the delivery system for that air -- we leave the bulk of the comfort and efficiency equation out in the cold.

HIGH PERFORMANCE HVAC CONTRACTING: AN INDUSTRY WITHIN AN INDUSTRY

Thousands of contractors over the last 25 years, have turned their focus and energies (and training dollars) toward becoming high performance HVAC companies focused on performance-based contracting. They are literally an in industry within the overall HVAC industry.

This magazine is dedicated to them.

Our mission is not to usurp the domain of



Mike Weil is editor-in-chief of HVAC Today magazine. For comments and story ideas, he can be reached by email at mikew@ncihvac.com

THOUSANDS OF HVAC CONTRACTORS HAVE EVOLVED THEMSELVES TO FOCUS ON PERFORMANCE-BASED CONTRACTING. THAT IS OUR AUDIENCE.

other trade magazines serving this industry. In fact, it is quite the opposite -- our goal is to work in tandem with those publications as we focus on this small, but growing aspect of the HVAC Industry. Our editorial will be written by high performance contractors for contractors who are also performance-based or who are considering taking that path.

Our coverage will highlight the news and technologies that impact performance-based HVAC contractors and their customers. It will also cover the changes in the business that are necessary to successfully implement processes and procedures for operating as a high performance company.

So happy birthday to **High Performance HVAC Today**. Please be sure to visit our website at HVACToday.com and leave us comments to let us know what you think. **NCI**

High Performance Is A Mission

NCI MEMBERS WIN NATIONAL RECOGNITION

Several National Comfort Institute, Inc. (NCI) member companies recently received a national award from Carrier Corporation. The 2017 Carrier Presidents Award was presented to nine HVAC contracting companies from across the United States. These companies include:

- Allied Air Conditioning and Heating, Libertyville, IL
- Hammond Services, Griffin, GA.

The award is given in recognition of a contracting firm's commitment to quality, leadership and excellence in the heating, ventilating and air-conditioning (HVAC) industry.

For **Allied Air Conditioning**, this marks the ninth President's Award from Carrier.

"As a 50-year-old family owned company, we are honored to be part of the community by providing the finest product, best possible service by the best possible people in the north and northwest suburbs of Chicago," says Company Owner Greg Budinger.

Hammond Services of Griffin, GA also was recognized by Carrier for its superior quality, leadership, and service. Hammond is a 38-year-old firm that has been part of the NCI Performance-Based Contracting™ world since 2008.

Owner David Hammond says that job one is helping customers get rid of stress by helping them with their HVAC problems quickly and done right the first time.

Chris Nelson, president, North America HVAC Systems & Service for Carrier says, "This award recognizes Allied Air Conditioning & Heating and Hammond Services for their commitment to excel-



lence and Carrier is proud that they are ambassadors of our brand."

He adds that both companies are "first-class Factory Authorized Dealers."

ADDING CO SERVICES LEADS TO "GOT TO" STATUS LOCALLY

Last month, Performance-Based HVAC Contractor T.E. Spall, Inc. of Carbondale, PA became one of the only HVAC contracting firms in its local market to become 100% certified in Carbon Monoxide (CO) Safety and Combustion Analysis.

For the city of Carbondale, T.E. Spall is the "go to" company when it comes to CO-related problems, solutions, and prevention services.



T.E. Spall's entire field service and installation crew is now trained and certified to handle CO issues in consumer homes. National Comfort Institute's Senior Trainer Jim Davis conducted the training and certification testing in the Spall training room.

"We place a very high value on this type of knowledge and skill," says Company President Tom Spall. "It's important to us that our people can perform these services at a much higher level than most of our competitors. In fact – our performance-based services are something that 99% of the HVAC Industry is NOT currently doing."

"Because of that, we have earned a reputation as a real problem solver in our market. We can get to the root of a problem as opposed to just addressing the symptoms of the problem."

The Journal of the American Medical Association (JAMA) estimates that acute CO poisoning contributes annually to more than 2,000 deaths in the United States.

In addition, the US Consumer Product Safety Commission estimates that 8,000 to 15,000 people each year are examined or treated in hospitals for non-fire related CO poisoning. Breathed over long periods of time, low concentrations of CO may also contribute to other illnesses.

NCI November 2017 Training & Event Schedule

Introduction to Hydronic Testing, Adjusting, & Balancing

Nov. 6-7: Los Alamitos, CA*
Nov. 28-29: Cleveland, OH

Commercial Air Balancing Certification Program

Nov. 7-9: San Antonio, TX
Nov. 14-16: St. Louis, MO
Nov. 14-16: Tampa, FL

Combustion Performance & Carbon Monoxide Safety Certification Program

Nov. 7-9: Landover, MD
Nov. 8-10: Los Alamitos, CA
Nov. 14-16: Cincinnati, OH
Nov. 28-30: Philadelphia, PA

Duct System Optimization

Nov. 8-9: Lansing, MI
Nov. 14-16: Cleveland, OH
Nov. 14-15: Los Alamitos, CA*

Residential HVAC System Performance & Air Balancing Certification Program

Nov. 28-30: Atlanta, GA
Nov. 28-30: Dallas, TX

Residential HVAC System Performance Certification

Nov. 20-21: Los Alamitos, CA*

Performance-Based Selling Bootcamp

Nov. 28-30: Los Alamitos, CA*

*Subsidized NCI training offered by Southern California Edison.

WIRELESS STATIC PRESSURE KIT

An accurate manometer is one of the core instruments of a good air performance-based diagnostic technician. This kit includes the Testo 510i Smart Probe Manometer, static pressure tip, test port plugs, and much more. For additional information or to order, go to ncilink.com/1117SP-1 or call 1-800-633-7058



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For more information or to order,

SEND PRESS RELEASES: If you are a vendor or manufacturer serving the HVAC Industry and have a product geared to Performance-Based Contracting™ firms, send press releases and digital images to pressrelease@hvactoday.com. Final determinations on what releases run in **High Performance HVAC Today** are at the discretion of the editorial team.

go to the ncilink.com/1117CO or call 1-800-633-7058.

DWYER SAH SMART AIR HOOD™ BALANCING INSTRUMENT

This instrument is extremely accurate and easy to operate. By using the included hood stand and wireless communications to the handheld, a single operator can balance a branch in less time than by using traditional balancing systems. It is light and ergonomic making the Series SAH easy to maneuver. The hood features "Quad Flow Design Technology" for controlling air flow and minimizing backpressure for superior measurement accuracy. Quad Flow Design Technology directs the circulat-



ing air patterns to provide a more even air flow that minimizes backpressure, ensuring accurate readings. The Wi-Fi direct communication gives reliable communication with a distance of up to 200 yards (183 m) between the hood and the handheld test instrument.

For more information or to order, go to ncilink.com/1117Dwyer or call 1-800-633-7058

Turning It Around with Performance-Based Contracting

How do you go from a family-owned swimming pool business into the HVAC Industry? Simple. Mechanical inclination. That's what Greg Wallace says about how he got started. It all began during his high school days where, as a 16-year-old, he helped out with servicing the company's pool customers. As he explains, he had a knack when it came to things mechanical. So, after high school he got a job at the local airport as an HVAC technician trainee and eventually moved up the ladder to where he was working on big equipment – chillers, boilers, air handlers.

"I was mostly working on the air handler side of the business," he says.

His supervisor at the airport, named Steve Samson, began running an independent HVAC contracting firm called Valentine Heating and Air. He asked

Wallace to work for him part time. He worked for that company in the evening when he wasn't working at the airport. Eventually Wallace left the airport and went to work for Valentine Heating full-time.

PICKING A RECOGNIZABLE NAME

"About a year and a half later, I got my commercial HVAC License," he says. "Steve eventually made me a partner in the business and I worked there until 1993. We parted ways and I started Progressive Heating and Air Conditioning."

In the beginning, Greg Wallace operated his fledgling company out of his house. Starting out with just \$1,000 and a pickup truck, Wallace explains there was no client base or even a name for the business. All he had was one other worker besides himself and a sub for the installation work. He did

all the service work, sales, accounting, everything.

"I didn't want to name my company after myself -- I thought that would sound too small time. The name had to attract attention, something that sounded corporate. There was another company in Atlanta named Progressive Lighting and I thought my company was going to be a very progressive HVAC firm. So that became the name."

PROGRESSIVE GOES BIG TIME

Twenty-four years later, Progressive Heating and Air Conditioning is a \$5 million residential and commercial firm with 27 employees that fields 17 installation and service vehicles. According to Wallace, their focus is on residential service as well as custom new construction – large projects involving geothermal and remodel projects in higher end homes.

Because his target is mostly higher-end custom homes, Progressive managed to actually grow during those rough years between 2008 and 2009 when the real estate market bubble burst.

"During those years we saw a lot of builders in the residential new construction market go out of business. Our plan was to stick with just a few builders and focus on high end projects. We also took advantage of the equipment subsidies offered by the manufacturers and utilities for high efficiency equipment," Wallace explains.



"Progressive charges a lot for our services," he says. "As a company, we do things that very few of our competitors do and that is worth something to the customers. They are willing to pay because we have such a great reputation and work ethic. Oh, yeah – we deliver what we say we will deliver."

So, the company enters its 24th year with 80% of its business coming from the residential sector and the rest from light commercial. As the company grew and began bringing on more service technicians and installers, it became a necessity to adopt training programs to keep everyone on the cutting edge of technology.

"For me, training has always been important," Wallace says. "In the beginning, I was doing as much as I possibly could and the work out grew me pretty quickly. I began adding people and had to wrestle with the cost of training them. When you are the owner of a small company with just a few employees, it can be intimidating because you worry that they will go work for your competitors or become your competitor. What I found is, if that's the case that's just the case. There is too much to keep up with and if you want to serve your customers best, you have to have training."

NCI TRAINING CHANGES THE GAME

Though he doesn't exactly remember how he first learned of NCI, Wallace believes it was through his Trane distributor, Apex Supply, in Atlanta.

"I've gone through a lot of training classes," he says, "and when I attended my first NCI class through Apex, I was so impressed with what they taught. It really changes the game. The methods I learned for testing and diagnosing systems just makes everything so much easier."

"That's why I just started pulling all my guys in. They all have to go to your training. The Combustion Performance and CO Safety class is one of the best and has impacted everything we do in the field. Everything that we have done with NCI has just been really over the top, it has been really good."

Wallace says that before starting down the Performance-Based Contracting™ path, they only dabbled in testing. He says some of his trucks carried incline manometers and a few of his technicians could use them. "But we weren't using them like we do now," he adds.

"Today, I also conduct my own training classes weekly with the service department, so they understand

the pressure chart better and can better explain pressure issues to customers. I really don't want them coming to me with problems. I provide them the tools and training so they can mostly figure out system performance issues in the field.

"My guys know they need data -- airflow numbers, static pressures, and so on. And that is what Performance Based Contracting is, testing and measuring so you can figure out what is happening. So, the last 10 years training with NCI has really turned things around for us. Today we are really good at what we do."

PERFORMANCE-BASED CONTRACTING IS THE KEY

Wallace explains that his sales team has been through NCI training and they all have the tools necessary to test duct work on every call. That was the intention. He says that it doesn't always work out that way because some customers just aren't interested. They are shopping price.

"But I rarely see a change out that comes out of this shop that doesn't have some duct work attached to it," he says. "For us, simply swapping out boxes is gone and has been for years. Do we always get everything right? Of



Today's Progressive is 27 people strong with 17 installation and service vehicles.

course not. But when we make mistakes, we go back and fix them," says Wallace.

He says he believes that the performance way is really the only way. But to fully implement it takes time. In the last three years, Progressive has made huge efforts to convert their internal systems and processes to better manage the Performance-Based approach. Wallace finds you have to go slowly so as to not overwhelm your team.

"But it has opened my technicians' eyes," he says. "Sure, I teach them about it, but when I send them to train, it's like a light bulb goes off in their heads. They know that HVAC is so much more than just pushing air through duct work. They know that consumers deserve to receive the comfort and efficiency they were sold. And they want to deliver it."

"It has made us so much better at what we do. We have a much better final product."

Wallace adds that all his field technicians carry the NCI Magnahelic kit and clipboard.

COMPETITORS ARE SEEING THE LIGHT

Greg Wallace attended the NCI Summit two years ago in Savannah, GA with his son and one of his top service technicians. He noticed that many of his competitors were also in attendance.

"It didn't surprise me. We are all working the same market. Once upon a time seeing them at the same training event would have bothered me. Back then, I was bothered by what my competition was doing. Today, thanks

Creating a Mascot

Meet Breezy, (to the left of Greg Wallace) the Progressive Heating and Air Conditioning company mascot. Breezy was the



brainchild of Greg Wallace, who had the little guy built out of foam. He then held an Internet contest among his customers to come up with a name.

Once they had a number of names, Wallace had his customers vote on the one they liked best. The customer providing the winning name received around \$200.

The winning name was Breezy. Wallace had logos made with Breezy's image and the rest, as they say, is history.

to NCI and a mentor who owned a large company in the South Atlanta area, I am over that. I've learned that competitors can teach you things. We can all help each other combat the fly-by-night companies that sell on price and do half-baked work."

For Wallace and the rest of the team at Progressive, becoming focused on Performance-Based Contracting has changed the way they approach the market, has given them the tools they need to not only find their customers' problems, not only solve those problems, but prove they solved them too.

"We thought we were doing a really good job before," he says. "Now we can prove it. Now we can back everything up with data. We don't need to bad-talk our competitors, we just prove ourselves on each and every call."

Greg Wallace says he'd be remiss if he didn't recognize all the people who work for Progressive Heating. "They are the biggest part for our success. I have several employees that have been with the company for more than 17 years and others who have been here for 10 years or more. I appreciate

everything they have done and they are the ones who deserve the credit."

His advice for those who haven't begun walking the performance-based walk is to check out the NCI training.

He says, "Be sure to send some of your techs to both the NCI combustion and their system performance training. Anyone who deals with gas furnaces should check those out. Nobody teaches combustion and system performance the way NCI does. At least no one I've seen."

Questions? Comments. Go to ncilink.com/1117SL

*Congratulations to
Greg Wallace and the folks at
Progressive Heating and
Air Conditioning
— November's Contractor Spotlight.*



Mike Weil is the editor-in-chief of HVAC Today magazine, as well as the director of communications and publications for National Comfort Institute, Inc. He can be reached by email at mikew@ncihvac.com

Blaze Your Trail to High Performance with Help from these Industry Pioneers:



John Ellis
President,
SoCal Air Dynamics, Inc.

SESSION:

Where Indoor Air Quality Meets System Performance



Tom Johnson
President & GM,
TM Johnson Bros., Inc.

SESSION:

Became Your Local Carbon Monoxide Evangelist



Nathan Copeland
Comfort Advisor, Copeland & Son AC & Heating Service, Inc.

SESSION:

ComfortMaxx Air: Put it to Work!



Eric Johnson
Sales, Air Conditioning by Jay, Inc.

SESSION:

You Too Can Sell High Performance HVAC — If You Just Do It!



Vince DiFillipo
President,
DiFillipo's Service Co.

SESSION:

Productive and Profitable Duct Renovations



Kevin Walsh
Owner/President,
Schaafsma Heating & Cooling

SESSION:

Our Leap From Tradesman to Craftsman



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Don't Miss Fall Indoor Air Quality Opportunities



The fall season lacks the extreme temperatures that keep our services in high demand. Contractors must dig down deep and focus on new ways to generate business. Let's take a look at several performance-based HVAC benefits we can use in our marketing and daily conversations with customers to keep service leads coming in.

Oddly enough, when temperatures are mild, indoor air quality begins to suffer. In summer and winter months, many systems operate most of the time, struggling to move enough air and heat to generate comfort. But when heating or cooling demand declines

in mild weather, several other functions also decline. These include ventilation, dehumidification, and filtration.

ODDLY ENOUGH, WHEN TEMPERATURES ARE MILD, INDOOR AIR QUALITY BEGINS TO SUFFER.

Since each of these functions is essential to good comfort and air quality, let's take a look at our opportunities.

VENTILATION

Some ventilation can be provided from open windows and introducing outside air into the building. But this air is often unfiltered and contains excess humidity. Installing fresh air systems with filtra-

tion and dampers is one opportunity. Installing a thermostat that cycles the fan for ventilation is another. These services can solve many problems associated by ventilating with outside air.

Fall is also the time to check small bath and kitchen exhaust fans. They open the door for cleaning and replacing exhaust fans. Cleaning a small fan often quadruples airflow and that has a huge impact on moisture and odor removal from the areas they serve.

DEHUMIDIFICATION

When forced-air cooling systems no longer run, dehumidification also terminates. Consider recommending to your customers that they keep their dehumidification systems operating to remove moisture, especially in the Southern and Eastern U.S. Several manufactures are introducing some exciting new equipment with dehumidification capabilities.

Of course, once the heating systems kick in, dehumidification will begin again. The question is how much damage can occur in the building until that happens.

FILTRATION

Most filtration systems accomplish nothing unless air is passing through them. Though



THE NUMBER ONE CONCERN WITH FILTRATION IS EXCESSIVE PRESSURE DROP. AS FILTER EFFICIENCY INCREASES, STATIC PRESSURE INCREASES. THE HIGHER THE STATIC PRESSURE DROP THROUGH FILTERS, THE LOWER THE SYSTEM AIRFLOW.

filtration ties in closely with ventilation, consider it a stand-alone system component as well. Choose your filters and size them carefully.

The number one concern with filtration is excessive pressure drop that can seriously restrict system airflow. As filter efficiency increases, static pressure increases. The higher the static pressure drop through filters, the lower the system airflow. Install new fil-

ter housings to increase filter surface area to decrease pressure drop or install return air filter grilles. The filter installed to increase air quality can actually be the primary culprit in causing extremely poor indoor air quality. For constant speed fans, the NCI pressure budget is only 20% of the fan-rated total external static pressure.

Check installed filter static pressure drops to assure fan pressure remains

below its rated pressure.

Many high efficiency filters may require installing two or more filters into the system, increasing filter surface area, to assure the pressure remains lower than the fan-rated pressure.

By using these techniques, you can offer customers a safer and healthier environment, while adding dollars to your bottom line.

Questions? Comments. Go to ncilink.com/1117IAQ



Rob "Doc" Falke is president of National Comfort Institute, Inc. — an HVAC-based training company and membership organization. For more information about indoor air quality opportunities, contact him at rob@ncihvac.com or call him at 800-633-7058.

NCI MEMBERSHIP BENEFIT

MEMBER REWARDS

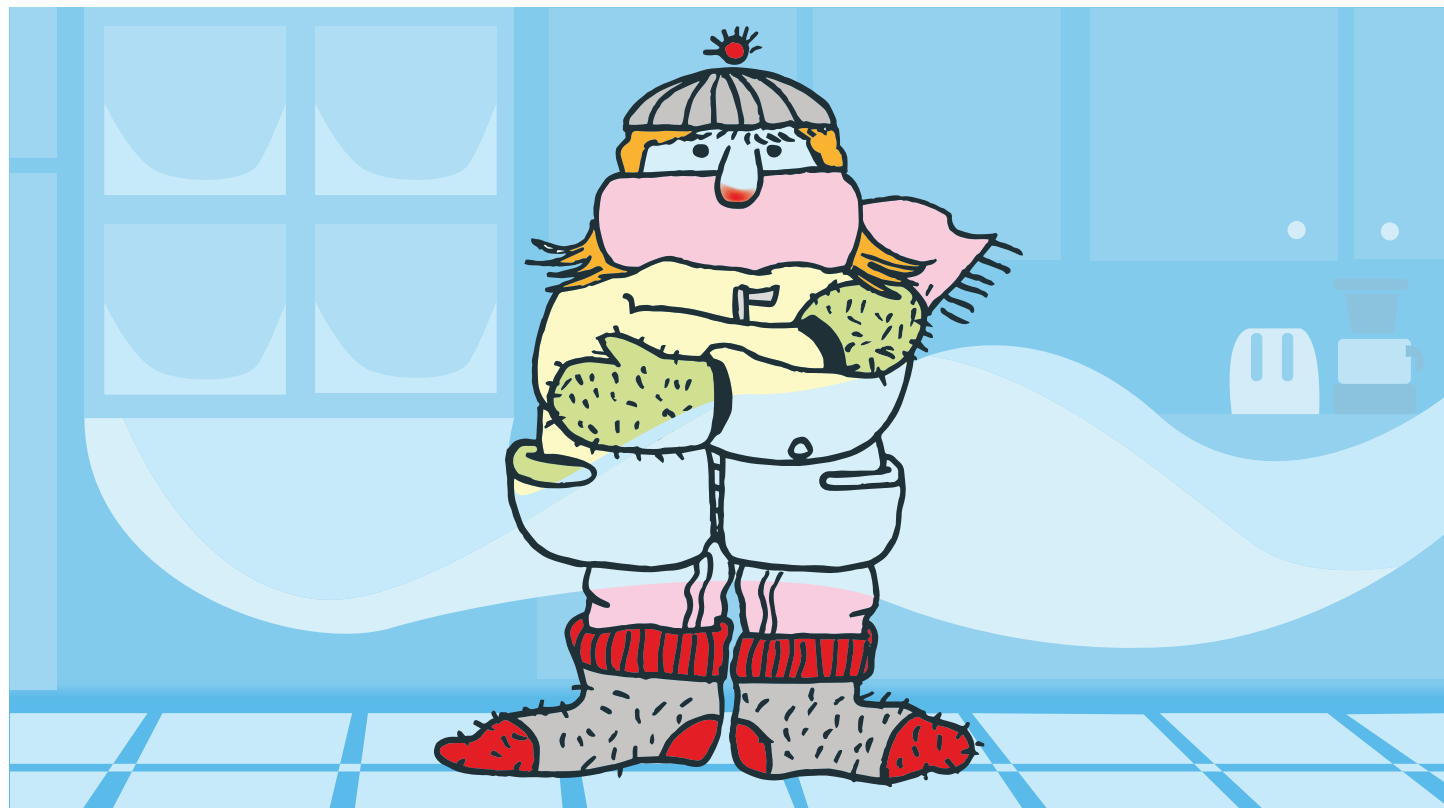
Training Incentive Partner Program

Put your incentive dollars to work
Convert incentive dollars into NCI Bucks for immediate use to train your Performance-Based Contracting team

Why is this such a great benefit? Let's face it, training is a big investment in terms of time and money. TIPP is designed to earn incentive dollars toward training through purchases of equipment, products, and services that you already buy from NCI industry partners. So when you do have the time to train your team, the dollars are already banked, ready to be used.

[CLICK HERE for more info](#)
1-800-633-7058

National Comfort Institute, Inc.



Don't Let a Cold Winter Make You Forget!

For many HVAC contractors, extremely cold winter weather generates many “no heat” service calls. Emergency calls stack up like firewood and there is substantial pressure on technicians to “get in and out” quickly. During these high-demand weeks, it’s common for technicians to take shortcuts so they can burn through as many calls as possible.

A LARGE BACKLOG OF EMERGENCY SERVICE CALLS IS BOTH A BLESSING AND A CURSE.

Instead of performing the thorough system diagnostic procedures that the customer deserves, techs resort to “quick fixes” to get the equipment up and running, then they move

on. They don’t invest time to search for opportunities to help the customer enjoy the safest, healthiest, most comfortable, and energy efficient system possible.

But is that really the way you want to run your business? Don’t ALL customers deserve your very best each and every time they use your services? You bet they do! Don’t let a cold winter make you forget who you are: a high-performance HVAC service provider!

Think about the doctor’s office example I shared in my September 2017 Peak Performance Newsletter article, “The Curse of Hot Weather.” If your doctor’s team decided to take shortcuts (not measuring your temperature, weight, pulse, and blood pressure) just because they were busy during flu season, how would you feel if you were their patient? Do you really have the flu? Could there be

other, more serious issues at play? How would they know what’s going on with you if they’re just guessing? Feels pretty lousy, doesn’t it?

While cold-weather-induced business may be a relief after the mild fall weather killed your phones, remember that great spring weather is right around the corner. The phones will stop ringing once again. While it’s important to get your customer’s heat back up and running quickly, it’s also important to look for opportunities to resolve long-standing problems that might help you fill your spring schedule, too!

THE BALANCING ACT

A large backlog of emergency service calls is both a blessing and a curse. The blessing is that you have plenty of work for your techs - as long as the extreme weather holds out. The curses are many: Even your best customers are impatient and unwilling to wait too long before they resolve their no heat problem by calling your competition. You need twice as many techs to handle the emergency calls but you can’t support them all year so you work your existing crew to death, catching as many calls as possible. Your customers didn’t plan on this extra expense (often occurring around major holidays) so they can’t afford your best solutions. We could go on and on about the curses associated with the “wait for it to break” business strategy!

How can you balance the need to “do what’s right” (measure, don’t guess) for EACH customer with the need to “stop the bleeding” (quickly get the heat back on) for ALL customers? Balancing their “immediate

needs” against what they “deserve” is key to a more predictable and profitable business. You need a strategy that balances both.

A COLD WEATHER STRATEGY

Here’s a simple cold weather strategy to consider. When your techs run a “no heat” call, they should ask the customer appropriate questions; properly diagnose the technical problem; present their repair price options; get permission to proceed; make the repair; observe system operation; measure and record the “vital signs” of the system; complete the invoice; debrief the customer; present the invoice; collect payment; thank the customer; and move on to their next call.

The “vital signs” your techs collect on each service call should include important performance indicators such as:

- Rated total static pressure
- Fan type and condition
- Fan speed setting

- Static pressure before and after the filter
- Static pressure before and after the evaporator coil.

Since they are super busy, they can just measure and record these readings to be reviewed and acted upon by the office – when the time is right.

Thinking again about our doctor office analogy, your service techs would be acting like a medical assistant in this cold weather strategy. WebMD.com defines this position as follows:

Medical Assistant: *After you’ve checked in, a medical assistant may show you to an examination room. They may check your height, weight, and blood pressure. They also will note your symptoms and pass that information on to the doctor. Medical assistants aren’t allowed to offer medical advice.*

That is a perfect description of what you need your techs to do during cold weather! They should measure and record the system’s



vital signs; note any safety, health, comfort, and/or efficiency symptoms; pass that information on to the office; make any required repairs to get the unit running. They shouldn't offer any further advice associated with other symptoms – unless it is a safety issue. Safety issues are ALWAYS top priority and require immediate action!

FILLING YOUR SEED BAG FOR UPCOMING PLANTING SEASON

Think of the system vital signs and symptoms that your techs collect during these no heat calls as “sales seeds.” They aren't ready to be planted right now because you don't have enough capacity to take on the required additional work. During cold weath-

er months, your job is to collect as many of these seeds as possible, store them in your seed bag, and plant them when you need to harvest more work during milder weather months.

Farmers know that good crops come from good seeds. The same is true in business. Good jobs come from good customers with whom you have an ongoing relationship. When you invest the time to help existing customers understand how your team can help them fully enjoy the bene-



fits of a high performance HVAC system, you'll find it much easier to keep your crews busy with profitable work all year long.

THE BEST TIME TO PLANT

According to Stark Bro's Nursery in Louisiana, Missouri:

“Think of your planting time as a range of favorable conditions instead of an exact time.

GOOD JOBS COME FROM GOOD CUSTOMERS WITH WHOM YOU HAVE AN ONGOING RELATIONSHIP.

For example, you can plant new plants and trees:

- When the ground is not frozen.
- During the day when temperatures are above freezing (32°F) and below 90°F.
- If no extreme weather (blizzard, hail, torrential rain, etc.) is in the forecast.”

This sounds like pretty good advice for the HVAC industry too!

In my opinion, the best time to take action with “sales seeds” collected during the winter is:

- When outdoor temperatures are be-

ginning to become moderate (check your 10-day forecast regularly!)

- After your installation crews are starting to get caught up (check your install schedule regularly!)
- As soon as you find your sales team just sitting around the office (check your sales schedule regularly!)

The three conditions listed above sound like a perfect description of most HVAC companies during the spring. How about yours?

Don't let a cold winter make you forget that you'll need more work in the spring! Do everything you can to

plan ahead and collect as many sales seeds as possible. Plant those seeds in the spring and enjoy an abundant crop of new, profitable work generated through opportunities discovered by evaluating and acting upon the system performance data of your existing customer base.

My next article will cover a good seed planting strategy for creating a good crop. Stay warm and stay safe!

Questions? Comments. Go to ncilink.com/1117CS 



David Holt is Director of Business Training and Coaching for National Comfort Institute, Inc. He can be reached at DavidH@nationalcomfortinstitute.com



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The Habitual Buyer

Ten years ago, I sat down on a sawhorse in front of a husband and a wife who met with me at their home. I was making recommendations to them about two HVAC systems while the home was being renovated.

I sat on a sawhorse because there was nothing else to sit on. My customer and his wife occupied the only other seats in the entire 7000-sq. ft. home -- her on a metal folding chair and he on the carpenter's small coca cola-decorated refrigerator.

Customer? Not prospect? This couple had used our company for years to maintain and replace HVAC systems in their previous home. They were our customers and they adored us because their health-challenged child had responded extremely well to our earlier indoor air quality renovations. We had earned their complete trust.

They were now being challenged

by their newly purchased home. It was about 50 years old and a nightmare for anyone with respiratory issues. The house had air leaks everywhere. Old insulation was full of rodent urine and feces. Plus, there were fibers, fiberglass, irritants, and other contaminants in the attic, in the walls and, of course, in the air ducts.

The customer was expecting a quote on renovating the existing HVAC systems which I suppose in their minds meant adding a little Freon and maybe cleaning the duct work.

So, what does this have to do with "The Habitual Buyer?" Everything.

SETTING THE STAGE

I'm going to let you in on a secret. In my former life as a professional electrical estimator I learned that information is often more important than process. The key is to find out as much as possible about your prospects or about any job you are about to quote.

In this case, I knew the customer could afford anything they could possibly want, so I showed them options that were absolutely the best possible solutions for the health of their home and family. I also knew that to do the job right and guarantee the family would breathe clean, contaminant-free air would be expensive.

I recommended gutting everything that had anything to do with the existing HVAC systems and all the insulation in the attic as well. My top option cost



\$98,000 and included two high end HVAC systems with humidity control, dehumidification control, IQAir Perfect 16 filtration, and fresh air infusion using ERV technology.

We would install two completely new clean, sealed, and spray-foam encapsulated air duct systems and provide triple safe water protection from all condensation. This option included a 10-year complete-coverage warranty for all repairs and maintenance.

I then proceeded to go over four other options with the least expensive one costing around \$24,000.

When I finished reviewing the options I asked them, "what should we do?"

They both thanked me for my honesty and the wife said, "I like that top option." I asked her what she liked about it and she said she just felt good about it. Her husband was quick to ask about the \$50,000 option. He and I discussed it at length, but his wife kept going back to my top option.

Finally, the husband smiled and said, "My wife always wants the best and I don't blame her. However, I'm an engineer and I like to take a more practical approach. It looks to me that we can get the same level of quality with the middle option and that is where I feel most comfortable."

The husband asked me to rewrite a detailed description of what we could do for his family in the \$50,000 price range. I was very happy to do that for him.

THE HABITUAL BUYER

Most consumers want to shop price. They want options. They want to spend their money the way they want to spend it. This is THE common habit among consumers.

Habitual buyers will pay a premium if you are a solutions provider. In this instance, it was obvious that dollar amounts had little to do with the purchase.

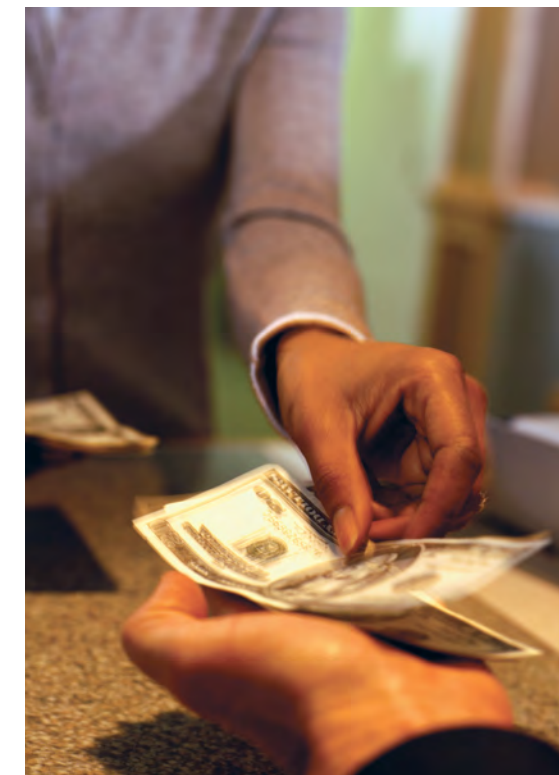
But, and this is a hot key, it had everything to do with immediately establishing the budget. How much would they be comfortable spending if it was justifiable (\$55,000 is what they ended up agreeing to)? What if my top option had been \$45,000? Would the wife be just as inclined to feel good about it?

Remember, these options were easily affordable for this couple. I point that out because if you do not have at least part of your offering at affordable levels, you will be quickly shown the door.

The husband felt comfortable in the middle. Why? He wanted options that would work for both he and his wife.

However, he had to see the details of that option because he did not want to short change his wife's desires. He knew what she really wanted was peace of mind concerning the health of her daughter. They both wanted me to make sure my company could provide protection from any kind of irritants or allergens that would cause her respiratory system trouble. Having expertise in indoor air quality was a big plus for my team and it got us in a door. That door now seldom shuts.

In this case, the husband had the final say and his wife trusted him. He wanted the detail to assure her that they could get what they needed at



what he considered a reasonable price.

Back to the habitual buyer. Everyone wants to shop. Your job is to provide options in such a way that they immediately find comfort in one of them.



FOUR TIPS ON SELLING TO HABITUAL BUYERS

1. Keep it simple and keep it about solutions and systems because these things require expertise, talent, and craftsmanship. If you make it about name brands, part names, etc., the buyer will habitually feel the need to comparison shop. You don't want customers shopping among competitors or online because it is not likely they will find anyone who will do as good a job for them as you will.

2. The bottom option. The bottom option is key because it lets the customer see your honesty. It requires two things: it must be very reasonably and competitively priced. If it looks like what they expected to pay, or what they "heard" cousin Betty paid for similar work, then they will trust that all your prices are honest and fair.

When they perceive your pricing is right, 80% of them will want to move up your option ladder. The bottom option must still solve the problem. Do not short change the needed or expected result because those who take the bottom option still deserve your expert work.

Do you see how the bottom option takes as much thought as the higher options? It is important to know your costs and price your work reasonably. If you do this right, your overall profit will skyrocket. However, if you are greedy you will often not get anything.

3. Your top option should be aggressive but not stupid. Example -- when a customer calls you to repair an air conditioner and you find a shorted contactor, the top option should not be a \$20,000 for a new system. That's the fastest way to get kicked out of a home. The top option



should be the best quality repair and perhaps renovation bringing the system back to "like new" condition. Wait and let them ask about a new system when they feel comfortable with you.

4. Customers default to shopping. Once again, the secret to the habitual buyer is knowing their default is to "compare and choose." They choose fast when they have something to compare. For instance, almost nobody will buy the last washing machine on the floor at Sears. The more washers on the floor, the more they will compare, and they will most certainly buy. You always sell far more when the customer has a choice.

OTHER NOTES

Ask yourself how habitual buying patterns affect you. Then ask how they affect those around you. I would be remiss without saying habitual buyers don't always buy the same way. Example, top shelf shoppers buy top shelf options when they have top shelf money. But when money is tight -- like after they pay their taxes -- they will still buy, but from the middle shelf.

Habitual buying patterns have little bearing on wealth. Wealthy

people can afford to take risks and are often more frugal, so they may take cheaper options. Someone who cannot afford for their comfort system to breakdown again will often pay a premium to assure no more breakdowns. But wealthier people are capable and will buy top shelf when it appeals to them.

There is more information available on this subject. After 10 years of study, I still make new discoveries. In my opinion, nothing simplifies your sales like catering to customer buying habits. They will be happier and you will be wealthier. That seems like a good "win-win."

Questions? Comments. Go to ncilink.com/1117HB



Rodney Koop, over the last three decades, has founded and sold HVAC, electrical, and plumbing service companies. He is a Master Electrician -- holding 10 unrestricted electrical licenses -- and has helped write and qualify exam questions for state board testing. During his career, Koop has contributed numerous articles and industry assessments to multiple publications and recently authored his first book. Today, Koop is the CEO and founder of *The New Flat Rate*.

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Visit Us at Summit 2018!

19 Attributes of a Great Leader

[PART ONE]

“THE GOOD-TO-GREAT LEADERS NEVER WANTED TO BECOME LARGER-THAN-LIFE HEROES. THEY NEVER ASPIRED TO BE PUT ON A PEDESTAL OR BECOME UNREACHABLE ICONS. THEY WERE SEEMINGLY ORDINARY PEOPLE QUIETLY PRODUCING EXTRAORDINARY RESULTS.”

— James C. Collins, *Good to Great: Why Some Companies Make the Leap ... and Others Don't*

HVAC companies that thrive in any economy don't rely on luck or lots of cash on hand. They thrive because they have leaders and leadership teams with vision and perseverance to guide them through.

In the world of Performance-Based Contracting™, you are the leader in your business and most likely in your marketplace. You already demonstrate some of the qualities of great leadership or you wouldn't enjoy the successes

that you currently enjoy.

So, what makes a great leader?

I suppose it depends on what management books you read or which consultants you listen to. There many books and articles written about leadership, almost too many to count. What I've found is that there are 19 common traits of great leaders that most everyone agrees on. With that in mind, I've created the following list of those top attributes. As you go through the list, think about how you can adopt those you might not have to help put or keep your company on the road to greatness.

LEAD BY EXAMPLE

“If your actions inspire others to dream more, learn more, do more, and become more, you are a leader.”

— John Quincy Adams,
6th U.S. president

Leaders need to show, not just tell. For example, if you want employees to be on time, make sure you're always on time -- or even early. If profes-



sionalism is a priority, make sure you're dressed for success, and treat everyone you interact with (both in-person and online) with courtesy. If you want technicians to do static pressure tests on every call, do it yourself first, then train your service manager or lead technician to conduct those tests and let them lead by example.

Set the tone and your employees will follow it. Great leaders do whatever needs to be done to move their organization forward. They will make the right decisions rather than an easy decision. Many top leadership consultants say that leaders who do these things are leaders worth following.

BE HUMBLE – FOR REAL

There's a difference between a leader and a boss. While both are in charge, a leader shares the spotlight and is comfortable crediting others. While it might seem counter intuitive, being humble takes more confidence than basking in glory. Your employees and customers will appreciate it. In fact, research organization Catalyst, states in a recent study of more than 1500 workers worldwide that humility is “one of four critical leadership factors for creating an environment where employees from different demographic backgrounds feel included.”

The study found workers felt strong bonds as a team when their leaders demonstrated humility by being willing to learn from criticism and admitting to making mistakes. They empowered followers to learn and develop. And those leaders took personal risks for the greater good, yet still held employees responsible for results.

COMMUNICATE, COMMUNICATE, COMMUNICATE

“The art of communication is the language of leadership.”

— James Humes, speech writer
for five U.S. presidents



Effective communication is important in all things, whether in your private life, or in the office and field. This means not only making sure you are heard and understood, but that you develop smart listening practices as well. It involves being specific in what you say, in the instructions you

provide, and objectives you describe. Communication is a two-way street, and making the most of it will keep your company moving forward, even during tough times times.

SHARE YOUR VISION

“Know what your future looks like, feels like, and acts like.”

— Brian Scudamore, founder and
CEO of 1-800-Got-Junk?

Transport yourself into the future so you can see it with picture clarity. Then be as transparent as you can with all your team members. The more they know, the more you all are part of the same dream and vision. This strengthens the team and helps everyone work harder to get where you need to go. If you keep information from your team, they'll lose trust in you. That's when they look elsewhere. Steven M.R. Covey discusses the issue of trust in his landmark management book, “The Speed of Trust.”



BE TRUSTING

"The best way to find out if you can trust somebody is to trust them."

--Ernest Hemingway,
American author

By giving unwavering trust to your team, you inspire them to do a great job. Great leaders provide their teams with the tools and support they need, then get out of their way and let them do the work. Trust is like glue: it binds leaders to their followers and leads to team success. Stephen Covey further discusses this in *The Speed of Trust*.

HAVE PRODUCTIVE MEETINGS

"You should never go to a meeting or make a telephone call without a clear idea of what you are trying to achieve."

— Steve Jobs, co-founder, Apple, Inc.

Productive meetings -- this means being organized, task oriented, and having an agenda. It means limiting side conversations and other time-wasting events. If you trust your team, there is no need to micro-manage them. Do these things and meetings will run quickly and efficiently. Great leaders have meetings



only when necessary and limit them to addressing the task at hand.

KNOW YOUR LIMITS

"A man has got to know his limitations."

—Clint Eastwood as Dirty Harry in the 1973 movie, "Magnum Force."

We all have limits, no matter who we are. Great leaders have a clear under-



standing of their own limitations. They know that success is a team sport and there is no such thing as a "self-made" man or woman.

In a 2010 blog post, Performance Specialist Laura Lopez wrote, "Recognizing your limitations isn't about signaling weakness or about admitting defeat, it is the opposite, it is about empowering yourself to be more successful. Recognizing your limitations means losing your arrogance about others' abilities and engaging them to be part of the solution."

HAVE COMPASSION

"The purpose of human life is to serve, and to show compassion and the will to help others."

—Albert Schweitzer, theologian and Nobel Peace Prize recipient

Things do go wrong. Fact. Before jumping to conclusions or guessing what happened, take a deep breath. Use

compassion and empathy to help you understand what went wrong and how to make sure it doesn't happen again. Empathy is, according to *Psychology Today* author Ray Williams, "the social glue that holds human society together."

In his article, 'Why We Need More Empathetic and Compassionate Leaders,' he states that compassion and empathy are "not weaknesses" in the workplace. Rather they are strengths that build morale, bonds teams together, and often lead to stronger bottom line results.

FAMILY FIRST, WORK SECOND

Family first means just that: any time a team member has an urgent family issue they need to attend to, let them. Most of you know how often family issues influence work performance. Make sure your team knows that you care about their home life as well as their work life. It pays dividends in their performance and productivity.

Equally important, great leaders also put THEIR families first as well.

Questions? Comments. Go to ncilink.com/1117GL 

This ends part one of our two-part series on leadership. We covered nine of the 19 attributes. Next month we will provide the rest. In the meantime, we'd love to hear from you. Visit our website at HVACToday.com and leave a comment on this article.



Mike Weil is the editor-in-chief of *High-Performance HVAC Today* magazine. He would love to hear your comments, suggestions, and ideas. Send him an email at mikew@ncihvac.com



"High Velocity – NOT!" —Tom Spall, Carbondale, PA

This is a Geothermal unit rated at .75" TESP and 1350 CFM. It was installed to replace a high-velocity system, and connected to the 7" round supply duct, and a 15" round return. Oops!

Tom Spall of T.E. Spall & Son., Inc. is the November 2017 winner of our Photo-of-the-Month contest, as voted on by the subscribers to the [High Performance HVAC Today](http://HighPerformanceHVACToday.com) magazine and visitors to the website. He will receive a \$50 gift card.

You can too – submissions are always welcome. If you'd like to submit a photo for consideration in our Photo-of-the-Month contest, click below and fill out the information as requested.

Click Here

THE DECEMBER CONTEST OPENS ON NOVEMBER 10, 2017.

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To take advantage of this special members-only offer, contact your NCI customer care representative at 1-800-633-7058.

Be sure to check our newly designed Summit web page at GotoSummit.com. Check back often for updates and other news.

The 2018 theme is "Blaze Your Trail To High Performance." One of our key focuses is on sharing the success stories



Leads, and Increase Our Closing Rates. – presented by Nathan Copeland, Copeland and Son, Nashville, TN

■ **From Tradesmen to Craftsmen: How Our Company Made the Leap** – presented by Kevin Walsh, Schaafsma Heating and Cooling, Grand Rapids, MI

■ **How We Systematically Perform Productive and Profitable Duct Renovations** – Even the Tough Ones! – presented by Vince DiFilippo, DiFilippo Service Co., Paoli, PA

■ **Indoor Air Quality & System Performance: A Winning HVAC Renovation Combination** – presented by John Ellis, So Cal Air Dynamics, Northridge, CA

■ **How We Became Our Local Carbon Monoxide Evangelist** and Go-to Prob-

ble discussions, and a fantastic trade show.

But wait, there's more: Summit 2018 coincides with an incredible music and film Festival in Austin, Texas called **South-By-Southwest**, which

kicks off after Post-Summit training wraps up on March 8th.

There is a lot of excellent, thought-provoking, and entertaining activities at the 2018 Home and HVAC Performance Summit in Austin. [Be sure to register today.](#)

High-Performance Talk™

In other member news, NCI will soon launch a new and fully upgraded version of its PerformanceTalk™ discussion forum.

This "2.0" version is called **High-Performance Talk** and it will enable users to not only interact with each other via email (as the current version does now), but also allows users to post and view other posts via a website.

Other improvements to this member benefit include:

- Conversations all stay on one page. Plus you can now jump around conversations easily using a smart scroll bar.
- This service is 100% mobile friendly – visiting HighPerformanceTalk.com on your mobile device allows you to read or post right then and there.

• Badges and Emoji are now available! There is so much more! High Performance Talk is now live. Go to highperformancetalk.com/ and start taking advantage of this latest member benefit.

lem Solver – presented by Tom Johnson, TM Johnson, Cambridge, MN

■ **We Sell High Performance HVAC – You Can Too If You Just Do It!** – presented by Eric Johnson, Air Conditioning By Jay, Scottsdale, AZ

There's a lot more in store for you including great general sessions, roundta-

ONE KEY FOCUS OF NCI'S 2018 SUMMIT IS TO SHARE SUCCESS STORIES OF SIX FORWARD-THINKING MEMBERS WHO'VE CREATED A HIGH-PERFORMANCE HVAC CULTURE IN THEIR BUSINESSES.

of six forward-thinking NCI members who make High-Performance HVAC an integral part of their company's culture.

Here's a preview of their six breakout sessions:

■ **How We Put ComfortMaxx to Work** to Improve Our Confidence in Field Testing and Diagnostics, Generate Better

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Performance-Based Contracting Finally Gets Its Voice



Dominick Guarino is publisher of HVAC Today magazine and CEO of National Comfort Institute, Inc. He can be reached at domg@nci-hvac.com

We hope you've enjoyed the inaugural issue of **High Performance HVAC Today**. This magazine is the next step in supporting and giving voice to a growing segment of the HVAC industry. This first issue will reach about 13,000 HVAC professionals. Our goal is 30,000 readers by this time next year.

To date, more than 25,000 professionals in 7,000+ residential and commercial companies have embarked on the journey towards providing measured, verified performance on HVAC systems across North America, and worldwide.

Performance-Based Contracting™ is more than

THESE CONTRACTORS UNDERSTAND THEY CAN PROVIDE CUSTOMERS WITH THE HIGHEST LEVEL OF QUALITY AND PERFORMANCE WHEN THEY ACTUALLY TEST EVERY HVAC SYSTEM THEY COME IN CONTACT WITH.

just a technical discipline, it's a culture within organizations that aren't satisfied with just installing, replacing, or servicing equipment. These contractors understand they can provide customers with the highest level of quality and performance when they actually test every HVAC system they come in contact with. Performance testing allows them to verify each system is operating at optimum performance, and provide documented proof.

WHO IS HIGH PERFORMANCE HVAC TODAY?

To better explain the genesis of this magazine, let me tell you a little bit about our staff and contributing authors.

We have been blessed with an amazing team with a combined 200+ years experience in publishing and working within the HVAC industry.


Our editor-in-chief, **Mike Weil** has more than 34 years of experience in magazine publishing, nearly 30 of those in the HVAC industry. He brings with him a wealth of knowledge and understanding of what makes our industry tick.

High Performance HVAC Today's art director, **Connie Conklin** has over 30 years experience in graphic design and magazine production. **Brian Roseman**, our online development director, has 20+ years in graphic design. He's been designing and maintaining many websites including HVACToday.com and [National ComfortInstitute.com](http://NationalComfortInstitute.com) for the past 10 years.

Our sales manager, **Dave Kenney** has worked on several industry publications over the past 10 years, and has been in the print/online publishing business since 1990. **Andrea Begany-Garsed** is this magazine's circulation manager with more than 19 years experience in publishing and marketing. Our editorial assistant, **Marge Smith**, has 25 years experience in magazine publishing and 16 years with National Comfort Institute (NCI).

As publisher, I've personally had the honor of serving the industry since 1987 as a chief editor and associate publisher of several industry publications, HVAC sales and installation manager, and most recently, NCI's Chairman & CEO.

Our contributing authors include **Rob Falke**, **David Richardson**, **David Holt**, and dozens more NCI staff and members who have hundreds of years of combined experience in Performance-Based training and contracting.

We are very excited about the future of the High Performance HVAC industry, and this magazine that was born from it. Over the next months you will see numerous industry authors in the pages of this publication. We look forward to seeing **you** at the [High Performance HVAC Summit](http://HighPerformanceHVACSummit.com) in Austin, Texas on March 4, 2018! 

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