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Annual Service Issue

Performance
Service Agreements

Supercharged Service
with Performance-
Based Diagnostics

Safety is Job One



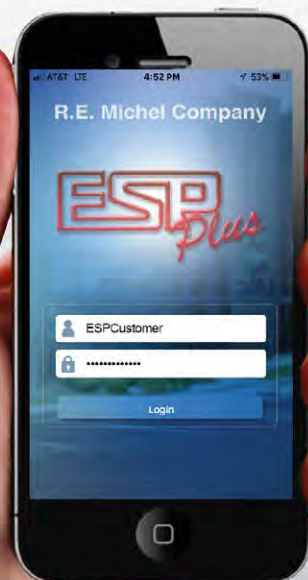
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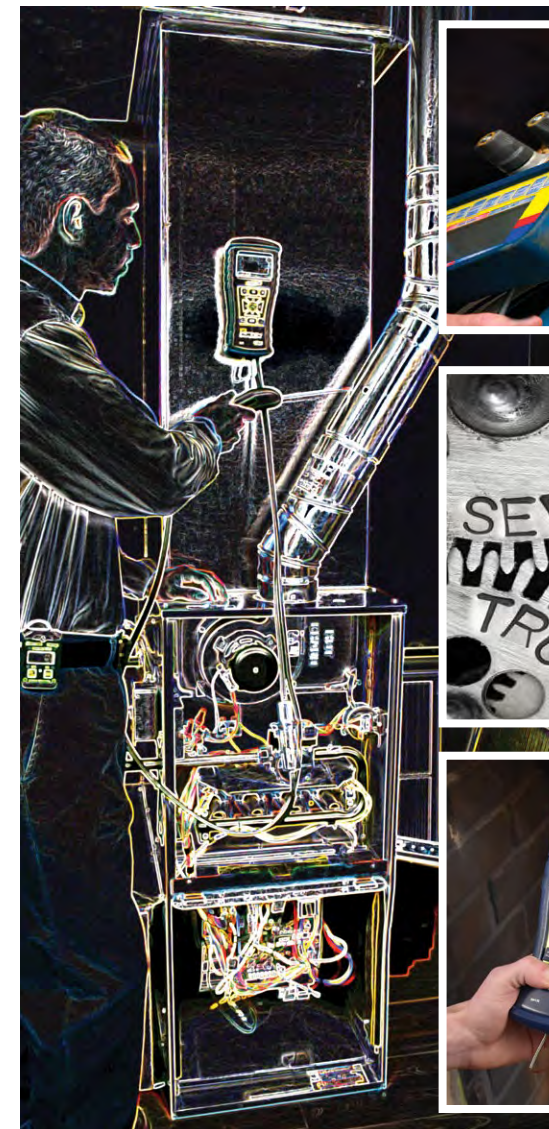
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APRIL 2018 VOLUME 2 NUMBER 4

HIGH PERFORMANCE HVAC TODAY™



SERVICE AGREEMENTS:
Performance Should Be Native to Your Service Agreements
From a technician's viewpoint, here is why performance service is so important.



SERVICE MANAGEMENT:
Supercharged Service with Performance-Based Diagnostics
It's not enough to implement performance into sales and installation. It must be part of your service as well.



CUSTOMER SERVICE:
Safety is Job One
Performance-Based Contractors must always consider customer safety as their primary concern on all projects. Here is why.

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MONTHLY DOWNLOAD

This Tech Tip is a one-page checklist providing instructions for navigating the digital menu of the TSI/Alnor EBT Balancing Hood. First, it includes a seven-step checklist for setting the instrument up to take airflow readings up to 500 CFM at registers and grilles. It also includes a 17-step process for taking airflow readings when grille and register airflow is more than 500 CFM.

Go to ncilink.com/md0418, or use your phone with the QR Code below.

By registering for free on NCI's website, you can access this download plus many others.



ONLINE UNIVERSITY

Featured this month is the NCI's Fan Laws training. Using fan laws is an essential part of adjusting system airflow in commercial equipment with belt-drive motors. In this module we discuss the three basic fan laws and how to apply them to a commercial HVAC system.

For those of you looking for more than in-person training, these online courses focus on several areas of concentration:

- NCI-specific training on testing and measuring
- Exclusive NCI soft skills and business training
- Basic HVAC training to help prepare students for various NATE certifications and more.

Learn more here: ncilink.com/ou0418



BLOG POSTS

CARBON MONOXIDE: WHAT DO YOU KNOW?



Something isn't making sense. You have visual signs of flue gas spillage from the water heater due to melted grommets, but your CO readings are showing the water heater is operating safely. Could there be something else going on that's creating the spillage? David Richardson provides insight to help solve this mystery. Read it here: ncilink.com/KnowCO

SALES CLOSING THE PERFORMANCE-BASED WAY



In a Performance-Based Contracting Business, your job as a salesman is to not only find out your customers' pain spots, but to know what makes your company different from all the rest. Then the key is communication. David Holt shares his insights and details how to get around the "box pricing" quagmire most of you face every day. Read his blog here: ncilink.com/SalesClosing

THERE'S AN APP FOR THAT ...

Mobile apps for HVAC contractors are everywhere. Do they provide big bang for the buck (or download time)? Not necessarily. NCI's David Richardson has found a number that make great sense for the Performance-Based Contracting™ community and we present those here.

This month we highlight one from DesignStein, LLC called **SuperCool HVAC App**. This app includes a duct sizing and layout calculator, superheat and subcooling charging calculator, a compressor windings troubleshoot-



ing guide, plus a converter for everything HVAC. It even has heating and cooling airflow troubleshooting built in.

This is a free app available in both the [Google App](https://play.google.com/store/apps/details?id=com.designstein.supercool) and [Apple App](https://apps.apple.com/us/app/supercool-hvac-app/id1444444444) stores. Check them out and let us know if you think "the juice is worth the squeeze."



NCI MEMBERSHIP BENEFIT

MEMBER NCI 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.

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UNDERSTANDING, ACCELERATED



NCI Names the 'Best of the Best' During 2018 Annual Summit Event

During the National Comfort Institute (NCI) Summit 2018, held March 4-6 at the DoubleTree by Hilton Hotel Austin in Austin, TX, HVAC contractors were recognized for excellence in Performance-Based Contracting™.



For NCI's **Contractor of the Year** awards, the criteria are as follows:

- Implement Performance-based testing into service offerings
- Create and follow a Performance-Based business culture
- Have a strong service department which is service agreement based
- Engage in selling system renovations regularly
- Training is part of the culture.

Furthermore, there are three categories for these awards:

- ◆ **Small Contractor of the Year** – Companies under \$1.5 million in gross sales
- ◆ **Medium Contractor of the Year** – Companies with \$1.6 to \$3.9 million in gross sales
- ◆ **Large Contractor of the Year** – Companies with \$4 million plus in gross sales.

2018 SMALL CONTRACTOR OF THE YEAR

Winner:

Hyde's Air Conditioning of Palm Desert, CA

This residential and commercial HVAC contracting firm has been in business for 45 years. Their mission includes provid-



Mike Hyde (center) received the NCI Small Contractor of the Year Award from President Rob Falke (right) and CEO Dominick Guarino (left).

ing "Wow!" service experiences to customers. They do that through a deep commitment to advanced technical training and certification.

2018 MEDIUM CONTRACTOR OF THE YEAR

Winner:

Getzschman Heating, LLC, Fremont, NB



Pictured from left to right: Co-Owner Scott Getzschman, Co-Owner Ron Getzschman, and two members of their team.

Getzschman Heating is a full-service, heating, ventilation, and cooling company dedicated to serving Omaha, Fremont, Blair, Council Bluff, and Wahoo, Nebraska with the highest quality mechanical systems installations and service. Their singular focus is the comfort of their customers' homes and families.

2018 LARGE CONTRACTOR OF THE YEAR

Winner:

Progressive Heating and Air Conditioning Corp. of Newnan, GA



Greg Wallace (center) of Progressive Heating and Air. To his left, NCI Chairman Dominick Guarino and NCI President Rob Falke is to his right).

Progressive Heating and Air Conditioning serves residential/commercial HVAC customers in and around Newnan, Georgia. Company Owner Greg Wallace attributes the company's steady growth to a commitment to training and staying on the cutting edge.

For the **NCI Training Excellence Award**, NCI looks for companies with the following attributes:

- Training is part of the HVAC company culture
- The company provides employees with constant internal and external training and education
- The company has well-designed training facilities conducive to learning
- The company shares knowledge and training with other NCI members.

2018 TRAINING EXCELLENCE AWARD

Winner:

All Pro Plumbing, Heating, and Air Conditioning of Ontario, CA



Pictured from left: All Pro Field Manager Nick Perez, All Pro Service Manager Mike Greany.

NCI President Rob Falke presented this award to All Pro's Michael Greany and Nick Perez. Falke said that one of the distinguishing things about this company was that "nearly 75% of their 53 technicians – including plumbers – go through NCI training and earn certifications.

The **John Garofalo Implementation Excellence Award** is named in honor and memory of NCI Business Coach John

Garofalo, who lost his battle with cancer in 2016. The criteria are as follows:

- The company regularly delivers measured performance in every aspect of its business
- There are visible benchmarking/scoreboards with up-to-date performance results posted
- The company has strong leadership
- The management team sets ethical standards, with humility
- The management team is constantly looking for ways to improve
- The entire team is willing to embrace change.

2018 JOHN GAROFALO IMPLEMENTATION EXCELLENCE AWARD

Winner:

Kenniham Plumbing, Heating, and Air Conditioning, Valencia, PA



NCI's David Holt (left) with Bill Kenniham (second from left), Jose Montes (third from left), and NCI President Rob Falke (right).

Kenniham's lives up to the Garofalo requirements in so many ways. Suffice it to say the 49-year-old, family-owned and operated business goes out of its way to help Western Pennsylvania consumers be more comfortable in their homes and reduce their energy use so they can save money on utility bills.

NCI's David Debien Technical Excellence Award is presented in memory of Houston Contractor David Debien who, despite a life-long battle with diabetes which eventually took his life, dedicated himself to non-stop learning, developing, and teaching strong technical skills in testing and measuring HVAC system performance.

The requirements for this award are:

- The individual must have strong technical skills, especially in air-side and combustion testing
- They must perform diagnostic testing on service and installation projects
- They teach others in their company to test and measure performance
- They are a constant learner, always seeking to improve knowledge.

2018 DAVID DEBIEN TECHNICAL EXCELLENCE AWARD

Winner:

Tom Johnson, TM Johnson Brothers, Inc., Cambridge, MN



David Richardson (left) presents Tom Johnson (2nd from left) with the 2018 David Debien Technical Excellence Award. Also presenting were NCI Chairman and CEO Dominick Guarino (right) and NCI President Rob Falke (2nd from right.)

Presenting this year's award to Tom Johnson, was NCI Trainer and Curriculum Developer David Richardson who was the very first recipient of the Debien

Award, 11 years ago.

"TM Johnson Brothers does all of these things which is why they received this professional designation. The company is customer focused, training focused, and service focused, and has been since its founding in 1964," Richardson says.

Next is **The Vendor Partner of the Year** award. The criteria are as follows:

- This vendor partner exhibits strong support of the NCI membership with special pricing, discounts, or rebates
- They seek to improve their member relationships and member benefits
- They promote NCI training and membership to their own customer base
- The industry partner assists NCI training around the country by providing hosting locations.

2018 INDUSTRY PARTNER AWARD

Winner:

Austin Energy, Austin, TX



From left: Dominick Guarino; Austin Energy's Terry Moore, Residential Conservation Energy Manager and Tom Turner, Environmental Program Coordinator for Field Services; and Rob Falke.

Austin Energy is the nation's eighth largest publicly owned electric utility. Dominick Guarino says, "More than 15 years ago this utility contacted NCI to learn more about our training. That

led to a partnership where Austin Energy not only worked with NCI to educate local contractors, but also required NCI certification for any contractor participating in their ratepayer programs.

NCI's highest award is the annual **Chairman's Award**. This is presented to the one company that meets and/or exceeds the following criteria:

- Strong supporter of NCI and our shared mission
- Implements all aspects of NCI's methods in service, sales, and installation
- Excellent sounding board for NCI's leadership – provides great feedback
- Great contributor of ideas, energy, time.

2017 CHAIRMAN'S AWARD

Winner:

Ball Heating and Air, Biloxi, MS



From left: Dominick Guarino; Jim Ball, Ball Heating and Air Conditioning; and Rob Falke.

NCI has watched Ball Heating step up their efforts over the years to really deliver high performance HVAC systems. Guarino told the audience that "they've significantly invested in NCI training and coaching. In particular they have placed a major emphasis on putting together the right internal systems to support their focus on delivering and maintaining high performance systems."

Upcoming NCI Training & Event Schedule

Combustion Performance & Carbon Monoxide Safety Certification Program

Apr 10-12: Chicago, IL
May 15-17: Los Alamitos, CA

Introduction to Hydronic Testing, Adjusting, & Balancing

Apr 10-11: Cleveland, OH
May 8-9: Los Alamitos, CA*

Residential HVAC System Performance & Air Balancing Certification Program

Apr 10-12: Los Alamitos, CA*
Apr 10-12: Tulare, CA*
Apr 17-19: Denver, CO
May 1-3: Portland, OR
May 1-3: New Castle, DE
May 8-10: Northern, NJ
May 15-17: Minneapolis, MN

Performance-Based Selling

Apr 17-19: Los Alamitos, CA*

Duct System Optimization & Residential Air Balancing Certification Program

Apr 17-19: Cleveland, OH
Apr 24-26: Austin, TX
May 22-24: Pittsburgh, PA
May 30-June 1: Milwaukee, WI

Optimize Economizer Performance with Certification

Apr 26: Los Alamitos, CA*

Commercial Air Balancing Certification Program

Apr 10-12: Dallas, TX
Apr 24-26: Middletown, CT
May 8-10: Nashville, TN
May 15-17: Boston, MA
May 22-24: Los Alamitos, CA*

Commercial HVAC System Performance Certification Program

Apr 24-25: Los Alamitos, CA*
May 22-23: Richmond, VA

*Subsidized NCI training offered by Southern California Edison.

PORTABLE COMBUSTION AND EMISSIONS ANALYZER



Bacharach, Inc. recently introduced their PCA® 400 combustion analyzer.

The PCA 400 provides efficiency measurements and combustion emissions data during the fuel burning process that helps facilitate improved system performance, a reduction in energy consumption, and decreased emissions impact on the environment.

It is an industrial-grade product with features and benefits not typically seen in this level of instrument.

The analyzer has 12-hour recharge-

able and optional alkaline batteries, plus sensor protection and long warranties for key combustion gases.

- Measures CO, NO, NO₂, and SO₂
- Automatic sensor protection for quality measurements
- Five-year O₂ sensor performance and warranty for lower cost of ownership.

For more information, go to ncilink.com/PCA400.

DURABLE TOOL BAG

Greenlee Textron Inc.'s Next-Generation technician toolbag is built from a poly and nylon Ripstop fabric which contains any tear that might occur. Critical



seams that receive stress from weight are reinforced with double and triple stitching to prevent separation.

Next Generation bags are lined with a light green interior to increase visibility of contents. A durable, hard plastic bottom keeps dirt and water out and allows the bag to stand in an upright position for easy access.

Other features include:

- Padded lumbar support
- S-strap shoulder strap designed for ergonomic form-fit to evenly distribute weight
- 30 double-stitched pockets for tool storage and organization.

Go to ncilink.com/GreenLee for more information.

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May the G-Force Be with You



The Getzschman team is ready to roll

In Nebraska there is just this feeling in the air. A powerful feeling. Especially in the greater Fremont area. Some call it a force. But those in the know understand that it is more than that. It is "The G-Force."

The G-Force is powered by a strong family commitment to the community, one that focuses on excellence and has since 1960. You see that is the year the G-Force came into being – sort of.

What I am talking about is Getzschman Heating, LLC, a 58-year-old commercial and residential HVAC firm that has remained a family company since Richard Getzschman started it. In 1960 Getzschman Heating was born, but it existed in other forms before then. Richard began his HVAC career working for a company called Nebraska Sheet Metal.

He eventually left that firm and joined forces with a friend and, in 1958 their company, Smith and Getzschman, made its mark on the world. In 1960 Richard left and started Getzschman Heating and Sheet Metal. Eventually he dropped the sheet metal portion of the name and the current Getzschman Heating name came into being. The company still operates a significant sheet metal operation.

Richard had four sons and three eventually joined the business. Ron Getzschman

joined in 1972, his brother Scott in 1978, and youngest brother, David Getzschman, joined seven years later in 1985.

The company, which started in the garage of the Getzschman home in 1960, now operates out of two facilities. The headquarters is located in a 20,000 sq. ft. former shopping center in Fremont that Getzschman bought in 2007.

CURRENT OVERVIEW

Getzschman enjoyed \$9.7 million in gross sales in 2017 and according to Ron Getzschman, is budgeted to do about \$9.9 million in 2018. Revenues come from the commercial (50%) and residential sectors (50%).

They have 53 employees and field 16 service vehicles, six installation trucks on the residential side; 11 vehicles on the commercial side. Ron and Scott, and Roger Pannier co-own the business, with



The Getzschman brothers from left to right: Scott, Ron, and David.

Scott focused on the residential service side. Ron handles the residential installation business, David focuses on commercial, and Roger oversees accounting.

Since the beginning, this company always put the customer and the community first. The G-Force concept is part of a marketing campaign

that pushes fast and reliable service and backs it up with measurable and verifiable diagnostics.

According to Ron, this is a key differentiator that sets the company apart from



its competition. This requires technicians to be highly trained in what Ron calls, "G-Verify System Efficiency Diagnostics."

"We have the most extensively trained, longest tenured service staff in the area. Our technicians are trained to work on all makes and models of air conditioners, furnaces, and heat pumps," he says.

EVOLVING TOWARD A PERFORMANCE-BASED APPROACH

Ron Getzschman attributes G-Verify to their incorporating a Performance-Based Contracting™ approach to their business.

"We've been focused on training and education for years and our move toward the NCI (National Comfort Institute) approach was natural."

In fact, they kind of flowed right into



Of the many training sessions conducted by Getzschman, this one focuses on Safety. Many sessions are done in the sheet metal shop.

NCI. Getzschman explains that his company originally joined Contractor Success Group (CSG) back in 1993 and never left throughout all the changes that occurred to that organization.

"That is what really launched our residential growth," Getzschman explains. "CSG specialized in business management training, including marketing. At that time, I was running our commercial department, but I dropped everything to focus on implementing what we were learning in the CSG training."

"This really helped us grow our business," he continues. "When we first started with CSG, our company was at \$1.8 million in sales. We began to grow at about \$1 million per year based on what we learned at CSG."

Historically, CSG eventually became Service Experts. And then Lennox bought it. And then ISL bought it. And then ISL became part of NCI.

"So, we never left," says Getzschman. "But once NCI bought ISL, the training shifted to the technical side and that changed everything for us."

He explains the technical training is what really enabled Getzschman to set itself apart in their markets. "With our membership in NCI, we found ourselves always on the cutting edge."

IMPLEMENTING WHAT THEY LEARNED

System renovation and air upgrade work on new installations, according to Getzschman, happens automatically today. "Thanks to NCI training, we now make sure everything is done properly. Still, when we first started we struggled. It

was a work in progress. We needed to do a better job of finding problems, especially in poorly sized and installed duct.

"In those early days, no one really understood the air side. The key for us was helping our Comfort Advisors understand and better communicate it to the customer."

And that is exactly what they did.

That indeed, is the G-Force!

Because so few others in the Fremont-Omaha market area measure, test, and verify system performance, it can create a difficult sales environment. Especially if the consumer is led to believe that everything Getzschman does is voodoo. But Ron says it doesn't matter.

"You almost always have to prove what you say to customers anyway. And we can and do prove ourselves every day."

G-VERIFY

He adds that Performance-Based contracting provides the proof not only for the customer, but for marketing as well.

"Our marketing says things that none of our competitors say. We explain how most people's HVAC systems waste 40% of their energy, even on brand new systems. Then we explain how our technicians identify inconsistencies in duct work,

why we audit performance on the existing system, and if we replace that system, how it must be properly installed and commissioned."

He says the Getzschman technicians do this on every installation. Then they recheck everything to make sure the upgrades and improvements have made a difference.

On the Getzschman website, consumers see the following 'definition' of commissioning, which is called G-Verify.

It says, *The Getzschman G-Verify testing and diagnostic methods are used on Air balancing and combustion efficiency test to measure the performance characteristics of the HVAC system compared to the collected manufacturer's specifications.*

On average, 40% of energy that heating and cooling systems provide is wasted. This includes brand new systems! There are three steps that must occur to assure that a system is operating at "High Efficiency".

■ *Pre-installation evaluation to identify current system efficiency performance.*

■ *Develop customized system configuration to maximize efficiency.*

■ *Post installation system testing and calibration to ensure comfort, efficiency and reliability.*

"Once that gets around to people in our community, competition becomes a non-issue. Plus, we conduct surveys on all our jobs. We receive reviews that rave about our technicians, especially how



Ron (left) and Scott Getzschman won NCI's Contractor of the Year Award during the 2018 NCI High Performance HVAC Summit in Austin, TX.

they explain everything and made everything work better than ever before. It is word of mouth marketing, and that just makes a tremendous difference for us."

IT'S A PROCESS

So just how do you implement all this good stuff into your HVAC business? By taking little steps.

Getzschman adds, "When it comes to Performance-Based Contracting, try to find what provides you the biggest bang for your buck. And then make that a company policy. Write down what those policies are, what you want done on every job.

"Make it part of the sales process as far as what your comfort advisor says to the customer. Then it is all about communications. It's about talking with and explaining to the customer what air up-

grades are and why it benefits them.

"It is up to us to make sure customers understand what we are doing and why."

He emphasizes that the performance process isn't something that they are done with. In fact, Ron Getzschman says they have a long way to go.

"There is always more training to do," he says.

CHANGE IS NOT EASY

The process obviously involves change and, like companies everywhere, change can be difficult. At Getzschman, implementing performance meant changing how field service and installation crews operated and interacted with customers. Ron Getzschman says some of his co-workers pushed back at first.

"You have to enforce the changes," he says. "If you don't, implementation won't

work, processes will be inconsistent, and your customers will push back as well."

Enforcement also means better communications from management. Ron says he meets with his installation crews every morning. They discuss issues. They also talk about the process. Together they work out the kinks.

"That is the best part. It provides buy in. If you're implementing performance, be sure to always meet and communicate with your people. Remind them that the goal is 100% customer satisfaction."

IT'S ALL ABOUT THE CUSTOMER

Another aspect of the Getzschman approach is their guarantee. Ron says they provide their customers a "two-year test drive." If anything goes wrong, Getzschman fixes it. No questions asked.

He says, "Sure, we've had to return

money to customers because something wasn't done right, or just for any reason. We've had customers who didn't like air coming out of the register, so they want us to remove the system.

"We don't complain. We give the customer their money back, and we remove the system. We've had to do that maybe six times over the last 20 years. If a customer is unhappy, you must make them happy or give them their money back."

He adds, "Reputation is everything. Our family name is on this business and that is something we take very seriously. So, we work hard everyday to keep our reputation high."

IS PERFORMANCE PROFITABLE?

Ron Getzschman pondered that question for a minute. Then he said, "We've seen steady growth on the replacement

side of the business, especially in the last three or four years. I know without the performance side of the business, profits would be going backwards. It will get better as time goes on."

He does say that the bigger issue is one of manpower. It gets harder each year for he and his brothers to find competent employees to work in both the commercial and residential arena. He believes one of the biggest problems the HVAC industry has is attracting young people.

"For decades the push has been to prepare high school kids for college. But in today's reality that option is becoming un-affordable and the jobs just aren't out there. Up until very recently no one paid attention to the solid living you can make in the trades, especially in the HVAC business," he says.

"There does seem to be a small movement toward changing this, but not enough. No one will help us if we don't try to help ourselves. Get involved. There are programs that you can participate in to attract young people to your company."

He says the world of Performance-Based Contracting also helps. Because now, thanks to modern test instrument and tool technology, HVAC is becoming more attractive. It is about using not only your hands, but your brain as well. And that can be the G-Force in your market.

Except you may have to rename it to better reflect your own company name.



Congratulations to Ron, Scott, Roger, and David and their entire team on being the April 2018 High Performance HVAC Today Contractor Spotlight.

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PERFORMANCE Should be Native to Your Service Agreements

If you are not adding performance into your service agreements- you could be missing a huge revenue stream. But first, your technicians must understand the importance of service agreements, particularly focused on performance.

Typical service agreement jobs include cleaning the condenser coil, checking capacitors, contactors, and compressors. They also include inspection of evaporator coils and heat exchangers. Technicians check the refrigerant charge, change filters, and complete their check sheet giving the homeowner a thumbs-up. But is that enough?

WHO BENEFITS THE MOST?

Ideally, everybody should benefit. Homeowners win if the agreement keeps their systems running smoothly, efficiently, and safely. Technicians benefit, because a strong service agreement base provides constant work for them year-round. And contracting companies benefit because service agreements bring in a constant revenue stream and tie customers closer to them.

But everything is not ideal. Many service technicians misunderstand how much revenue they should produce. This can lead to poor attitudes and a 'wrong' mindset.

For an example, when I was a service technician performing maintenance calls, my biggest complaint was that I couldn't make any money. I thought service agreement calls were a waste of my time, so I would blaze through them as fast as I could to move on to the next job.

My typical day consisted of four service agreement calls. I figured I was making about \$25 per service agreement, which totaled \$100 for the day. During slow periods I made roughly 50% less than I often made during busier times. This was based on doing those mind-numbing checklist agreements I referred to earlier.

Unfortunately, I was not alone. Today I hear similar complaints from other technicians who share the frustration I once felt. These grumblings might be occurring within your company as well.

From a business standpoint, we all understand the need to be profitable. On some level technicians know the company also needs to be competitive. By pricing service agreements slightly higher or lower than the competition, no one gets rich. The idea is that service agreements keep our companies top-of-mind with customers when there is an equipment issue.

THE COSTS OF SERVICE AGREEMENTS

Most techs don't think about the costs for performing service agreement work. For example:

- The company must pay someone to sell the maintenance: usually a Customer Service Representative (CSR) or a Technician
 - The company must provide phones for CSRs
 - The company pays for technician vehicles and tools
 - The company provides insurance for vehicle
 - The company pays for fueling vehicles
 - The company pays to maintain vehicles
 - The company pays technicians for the job.
- The list goes on, but you get the idea.

A LOOK AT PERFORMANCE

Let's convert these checklist-style service agreements into performance agreements and introduce a new approach to every service call. All you need is to add static pressure measurements to your existing service procedures. It typically takes no more than five minutes to perform the test, and the issues you will discover will lead to more opportunities. You no longer must wait for equipment break downs.

For this to happen, technicians need to install four test ports: entering the filter, exiting the filter, entering the coil, and exiting the coil.

Add the exiting filter pressure to the entering coil pressure. This provides Total External Static Pressure (TESP) and lets you know if airflow restrictions exist.

To discover the source of any restrictions, add in the following pressure measurements. The highest pressures indicate the most restriction to airflow.

- Find filter pressure drop by subtracting the entering filter pressure from the exiting filter pressure
- Find coil pressure drop by subtracting the entering coil pressure from the exiting coil pressure
- You can determine return duct pressure with entering filter pressure
- Exiting coil pressure also doubles as the supply duct pressure.

With a performance-based approach, technicians can discover invisible issues that have plagued customer comfort for years.

When static pressures are high, they tell us we need to renovate (make a bigger opening). Static pressure profiles help determine what needs to be

renovated. For example:

- When filter pressure drop is high, increase the filter surface area or install a less restrictive filter
- When coil pressure drop is high, clean the coil or increase the coil size
- When supply duct pressure is high, add more supply duct capacity
- When return duct pressure is high, increase return duct capacity

These airside renovations are called "Air Upgrades." You won't find these defects unless you measure.

COMMUNICATION

Another aspect of Performance-Based Agreements is communication. Technicians need to present the information to customers without getting technical. Explanations must be in terms the customer can understand. There are many resources available to help technicians with this.

For one, they can download the [Air-maxx app](#) for their smartphones. This app puts the measurements in colored scales that helps customers see what components are in a poor operating state. Almost everyone will understand green means good, and red is bad. You can take it a step further and compare static pressure to blood pressure. Anyone who has visited the doctor's office understands the importance of proper blood pressure.

For example, say you measured TESP at .82-in wc. and the system is rated for .50-in wc. You could say, "Mrs. Smith, measuring static pressure on your HVAC system is like a doctor measuring your blood pressure."

"I measured a .82 on your system, that is considered high. If your doctor measured your blood pressure that


high, you would be in stage three hypertension, which is very bad. The doctors would be scrambling trying to figure out how to relieve that pressure. Your HVAC system is currently operating under conditions like that."

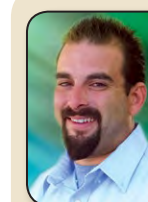
Then you can provide the customer options that fit their budget to address the issues.

For your Performance-Based Agreement you could, for example, offer a customizable 'Premium package' that includes quarterly or monthly visits where you perform standard checks and cleanings combined with static pressure measurements. You could also offer a monthly or bi-monthly filter replacement, add in a 25% discount on parts and service, and include same day service if something fails.

For basic packages, remove some aspects from the premium package and create your introductory levels. I recommend sticking with two or three packages at most.

The goal here is to train technicians on the importance of Performance-Based Agreements. Once they look beyond the equipment side of the system to the airside, new opportunities will emerge.

Technicians love it when they can improve the quality of their work life, their revenue, unique market position for the company, and happy customers. 



Casey Contreras is a field coach for NCI. He is based in Southern California, where he works alongside southern California Edison's Quality Installation Contractors. He has 10 years of residential, light commercial installation, and service experience. He can be reached at CaseyC@ncihvac.com.

Carbon Monoxide testing is a great addition to a performance agreement.

Supercharged Service with Performance-Based Diagnostics

A service manager reviewing the week's service records, called me to report a tell-tale pattern he discovered. He found most technicians consistently repeat the same 10 to 15 repairs. Let's take a look at the impact on your customers and company when technicians slip into autopilot and fail to search for performance-based solutions.

PERFORMANCE-BASED SERVICE

Many performance-based contractors have fully implemented testing and diagnostics into their sales and installation departments. However, many have not yet infused measurement and diagnostics into their service departments.

Performance-based service agreements offer additional features that go beyond the box to include the air distribution system. These advanced services distinguish you from your competitors and give you access to profitable new services you can offer your customers.

Performance-based service agreements only

include the cost of testing and diagnostics. All upgrades needed carry an additional cost. Static pressure and temperature are two of the basic test and diagnostic services included in a supercharged service agreement.

Static pressure profile – This test sweeps the duct system into the standard service agreement. It also elevates your level of service high above your competition and adds about five minutes to each service call.

- Pressure measurements quantify airflow restrictions caused by the filter and coil
- It identifies changes in the duct system performance
- Pressure measurements detect decreases in airflow
- Pressure measurements also will find any new restrictions or disconnects in the duct system.

Temperature measurement added to your service agreements uncovers hidden losses not found using normal service protocols.

- Measure and record temperatures entering and exiting the equipment and at the farthest supply register and return grille.
- This test can reveal temperature losses through the duct system that often cause efficiency losses of 30% or more during extreme temperatures
- The difference between the equipment discharge air temperature and the supply register air is degrees of temperature loss through the supply duct
- The air temperature difference between the equipment inlet and the return grille is degrees of temperature loss in the return duct.

Your customers buy service agreements for peace of mind and to discover new or ongoing defects. When these defects are found and resolved, your customer receives better performance and peace of mind in exchange for the

cost of a system upgrade. You receive additional income that your customers are happy to pay.

WHAT TO DO WHEN A PERFORMANCE DEFECT IS DISCOVERED

Every defect discovered through performance-based service diagnostics carries with it symptoms your customer is most likely to identify with.

The best way to approach a customer is to ask if they have noticed any of the problems associated with the defect you discovered in their system. When their answers confirm your diagnostic, describe what you found in terms they can easily understand. When you have taught them the cause and effect of the problem, your customers natural response is to want the problem fixed.

Here is an example of this low-pressure problem-solving discussion that will greatly benefit both parties.

The technician includes a static pressure profile in the service agreement. The static pressure of the return duct is only .02" w.c (inches of water column). This may indicate an extreme return duct disconnect. Summertime temperature testing reveals 102F air temperature entering the equipment. This indicates a massive amount of hot attic air pulled into the duct system.

The technician asks the customer if they have noticed if the unit runs continuously when the temperature is hot outside. The tech also inquires if utility bills have been excessive. Both these questions refer to symptoms of massive return duct leaks.

When the customer confirms they are living with these issues, then the technician describes the defects discovered from testing and explains how

the symptoms can be solved by repairing these issues. If the customer understands, the repair is priced and agreed to.

Your customer will soon be free from the grips of an issue that may have been bothering them for years but has gone undetected without performance testing.

PRICING SERVICE TESTING AND UPGRADES

Because the impact of these repairs usually carry a significant impact on the building's comfort and energy cost, the value of the upgrade demands far more than the usual time and material rates.

It's doubtful heart surgeons price their work at time and material rates. When solving problems, you step into a role far above the typical service tech and deserve to be paid for the value produced by a highly effective repair and the improvement it delivers. The value and cost of these solutions are typically 2 to 3 times normal service rates and are worth the cost.

Compare the value of a 40% increase in efficiency to the retail cost of 40% more efficient cooling equipment (if you can find equipment that much more efficient.) Remember, the traditional cost-plus markup doesn't apply here, you're selling solutions, not labor and material.

Consider expanding your service agreements to go beyond the box and provide advanced services that distinguish you from your competition. It also opens doors to badly needed and profitable services you can offer your customers.

Just today I spoke with two commercial balancing companies expanding the diagnostic portion of their air


balance businesses. Both are moving a large portion of their work away from traditional balancing to assessing HVAC performance in buildings. The profits are much higher, and customers appreciate them even more.

TWO VERY DIFFERENT SYSTEMS

A review of the manufacturer's recommended service and maintenance protocol makes it clear there is an assumption that the system being maintained performs as designed and to specifications. That's one kind of system.

The big question is, 'what percent of HVAC systems perform at this level?' Maybe one or two out of 10 systems?

By including performance-based testing in your service agreements, you can produce solutions and opportunities undetectable by equipment-only maintenance procedures. Talk about an untapped and undiscovered market!

Consider adding the performance-based testing and diagnostic culture into your service and maintenance department. Do what both you and your customer will benefit from the most and supercharge your service. 

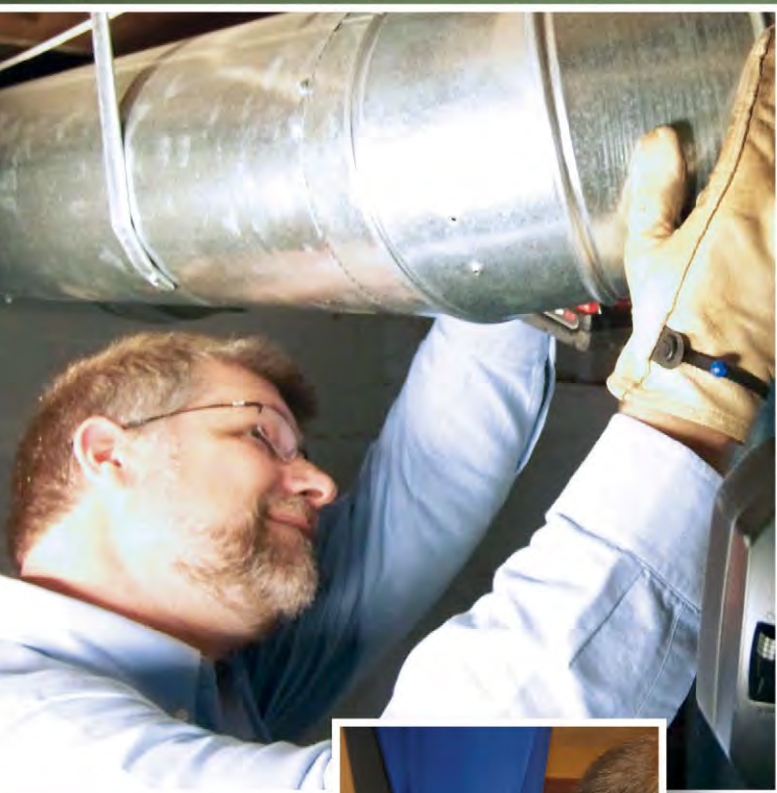


Rob Falke is president and co-owner of National Comfort Institute, Inc., (NCI). He has dedicated his career to developing improved methods of measuring the performance of HVAC systems. His quest is to advance others in their skill and ability to apply these principles in their various roles in the HVAC industry.

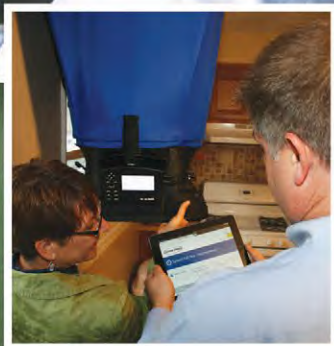


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Uncover air distribution upgrade opportunities to offer the highest quality, comfort, and performance your customers want and are willing to pay for.

CUSTOMER SERVICE

By Tom Johnson, TM Johnson Brothers, Cambridge, MN



Safety is JOB ONE

Every employee who enters a building should be equipped with a CO monitor device.

Safety is a topic we all talk about, but all too often breeze right over. We hear about it from everywhere, especially from our insurance providers. Plus, there are always the OSHA standards to consider as well as driving safety.

One thing we don't usually consider is the safety of our customers. As professional HVAC, Plumbing, and Electrical contracting companies, we really need to reexamine customer safety. Even though laws can vary depending on where you are located, I am very confident in saying the existing legal environment places a great deal of responsibility upon us to keep customers safe.

That actually seems reasonable — we should be helping customers to maintain a safe and healthy homes in which to raise their families. So let's

talk about some particulars, some details of what this might look like for you and your technicians.

If you are a member of National Comfort Institute (NCI), hopefully you know how important it is to get all your field personnel trained in Combustion and Carbon Monoxide (CO) Safety. Just in case you don't know, let me say this: Just Do It! Every person who enters a customer's home should know the proper protocol for identifying and correcting any dangerous CO situations.

Every day there are stories in the media from all over the U.S. and Canada about CO poisonings. I guarantee

you that lawyers have the same feeds from Google to see where these poisonings take place and if there is someone with a big insurance policy to go after!

The reality is that you are responsible to teach your people this stuff. We are responsible as an industry to prevent CO accidents from happening! The question is how? How can you possibly know all of this stuff? The answer is to get educated!

The thing is, having your team take one class doesn't cut it. The science and technology used to battle CO production in living spaces continuously evolves and changes. Education in our industry is never a "one-and-done" thing, especially when it comes to CO safety and combustion! Your live-

**THE REALITY IS THAT EVERY HVAC CONTRACTOR IS RESPONSIBLE FOR
TEACHING THEIR PEOPLE ABOUT CARBON MONOXIDE SAFETY**

lihood and your company may be at risk if you do not keep yourself and your field service people thoroughly educated on this subject.

SIX STEPS TO SAFETY SUCCESS

So, what are the steps?

■ **Get educated!** Get yourself and ALL of your field people trained and certified. By the way, NCI has one of the only nationally-recognized Combustion and CO Safety training programs.

■ **Buy the proper tools.** Every field person should be wearing a personal low-level CO monitor whenever they are representing your company. Each person needs to have access to and know how to operate a combustion analyzer.

■ **Test! Test! Test!** Every piece of equipment in a building that you work on must be tested for safety! If you are working on a furnace with no heat and the water heater next to it is spilling CO and you don't recognize it, you can and will be held responsible for it!

■ **Discuss your findings with the customer.** Teach your technicians how to do this — it can be the most important part of their job.

■ **Have written processes.** Have a written process for how you 'red tag' appliances and make sure each of your employees understands the process and are NOT afraid to implement it.

■ **Be knowledgeable.** You as the owner must have a solid knowledge of your local laws and codes. Be will-



Testing goes beyond just the HVAC equipment. Tom Johnson says it should include any gas-fired appliance from fireplaces to stoves and ovens, water heaters, and more.

ing to back up your field service employees. It must come from a company culture of helping to keep everyone safe and healthy.

The reality is: by learning and enforcing proper combustion and carbon monoxide safety procedures within you company, you not only reduce your liability, you will increase profitability.

In addition, there is no better feeling than to see a child from a home that you saved from a catastrophic event excel at something. You can sit back, smile, and know that you were key in helping that child be here today to excel! There really is no better feeling than that.

I know many HVAC contractors have saved people's lives! It may have never hit the news and made them famous, but nonetheless, they certainly are heroes! **NCI**



Tom Johnson is the general manager of TM Johnson Brothers in Cambridge, MN. He is a third-generation plumber and HVAC contractor who, with his brother Mark, bought out their father's business.

Mark retired three years ago. Tom is a strong supporter of the Performance-Based Contracting™ model and has trained his team to airflow and combustion test every piece of equipment they touch. He can be reached at tom@tmjohnsonbros.com.



"You Just Can't Make This Stuff Up"

— Nathan Copeland, Copeland & Son AC & Heating Services, Nashville, TN

This month's winning photo fits into the "WTH (What the Heck)" category. There seems to be a lot of this what-the-heck stuff going on. "Talk about recycling," Nathan writes. We doubt the customer is into THIS kind of recycling.

Nathan Copeland from Copeland & Son AC is the April 2018 winner of our Photo-of-the-Month contest, as voted on by subscribers to [High Performance HVAC Today 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 here and fill out the information as requested.

Photos can fit into one of three categories: The Good, The Bad, or The WTH (What the Heck)! We'll need a title for the image as well as a brief description.

We look forward to seeing your submissions and wish you all the best of luck in our MAY 2018 contest.

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Summit 2018 Roars into Austin

Performance-based contractors took center stage last week in Austin, TX, as NCI's Annual Summit Conference got underway. More than 100 contracting companies gathered in what was a record-setting Summit event.

This year's theme, "**Blaze Your Trail to High Performance**," focused on selling and delivering high performance HVAC systems via Air Upgrades. Air Upgrades are designed to surgically address and solve many indoor comfort, air quality, safety, and energy efficiency issues in homes and buildings.

During the Monday morning opening general session, NCI Chairman and CEO Dominick Guarino announced the formation of a new partnership with EGIA (Electric and Gas Industries Association) and the creation of a High-Performance HVAC Alliance.

Summit 2018 included six high performance workshops:

- ◆ **ComfortMaxx Air: Put It to Work in your Company!** – Led by **Nathan Copeland**, Copeland & Son AC & Heating Service
- ◆ **Productive and Profitable Duct Renovations** – **Vince DiFilippo**, DiFilippo's Service Co.
- ◆ **Become Your Local Carbon Monoxide Evangelist** – **Tom Johnson**, TM Johnson Bros Inc.
- ◆ **From Tradesman to Craftsman: How Our Company Made the Leap** – **Kevin Walsh**, Schaafsma Heating & Cooling
- ◆ **Where Indoor Air Quality Meets System**

Performance – **John Ellis**, So Cal Air Dynamics, Inc.

◆ **You Too Can Sell High Performance HVAC – If You Just Do It!** – **Eric Johnson**, Air Conditioning by Jay, Inc.

In addition to sessions, Dominick led a six-member contractor panel discussion on overcoming Performance-Based Contracting™ implementation hurdles.

The panelists included:

Jim Ball, Ball Heating & Air; **Tom Johnson**, TM Johnson Bros; **Nancy McKernaghan**, Canco Climatecare; **Jose Montes**, Kennihan Plumbing, Heating & AC; **Kevin Walsh**, Schaafsma Heating and Cooling; and **Paul Weiboldt**, Tradewinds.

AWARDS BANQUET

Later, during the closing Banquet and Awards ceremony, NCI recognized those member companies who made many advancements in implementation and achieved many levels of success in their companies.

Winners included:

- Small Contractor of the Year** – Hyde's Air Conditioning, Indio, CA
- Medium Contractor of the Year** – Getzschman Heating, Fremont, NE
- Large Contractor of the Year** – Progressive Heating and Air Corp. Newnan, GA
- David Debien Award for Technical Excellence** – TM Johnson Brothers, Cambridge, MN
- John Garofalo Implementation Excellence Award** – Kennihan Plumbing,

Heating, and AC - Valencia, PA

Training Excellence Award – All Pro Plumbing, Heating & Air – Ontario, CA

Industry Partners Award – Austin Energy, Austin, TX

Chairman's Award – Ball Heating & Air, Biloxi, MS.

Summit 2019 will be held in April in beautiful, Orlando, FL.
Stay tuned for more information on dates and location.

NEW High-Performance HVAC Alliance

During the NCI Summit 2018 conference in Austin, TX March 4-6, Chairman and CEO Dominick Guarino announced a new partnership with the [Electric and Gas Industries Association \(EGIA\)](#) and the creation of a new **High-Performance HVAC Alliance** for HVAC contractor members of both EGIA and NCI.

By teaming up, NCI and EGIA will now together deliver unparalleled value to HVAC contractors in both technical and business management training. Alliance members will receive both NCI's *Learning Excellence Premium Membership* package, and EGIA's *Select Premium Membership* package. [Click here for more detailed information on Alliance member benefits.](#)

Besides attaining significant savings for being members of both organizations, Alliance members also receive the following:

- EGIA three-Day Business Success Bootcamp (\$895 value)
- 70% off five-day EGIA Success Week Bootcamp (normally \$2499 – only \$699)
- Print subscription to High Performance HVAC Today magazine (\$72/year value)
- One paid Summit Conference Registration (\$695 value)
- \$4200/year in NCI Bucks used toward training.

Stay tuned for more details.

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The High-Performance Revolution



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Twenty-six years ago, I had the privilege of writing a forward-looking article in an HVAC industry publication titled, "*The Comfort Revolution*." The core message was that we needed to stop focusing only on equipment efficiencies, and expand our role to delivering measured and verified comfort to home and building occupants.

Thirteen years later I expanded on this concept in a book I wrote titled, "*The Comfort Revolution: Secrets of Performance-Based Contracting*." You can download it as a free E-book by going to ncilink.com/ComfortRev. The book outlines how to make delivered performance part of your company's culture and integral to the products and services you provide your customers.

It's very exciting to report that this Comfort Revolution -- started over two decades ago -- has now evolved into a High-Performance Revolution, with thousands of HVAC companies focused on all four components of high

SUMMIT 2018 - A NEW MILESTONE


Attendance at this year's High-Performance HVAC Summit in Austin, Texas was proof positive of the growing movement. Now in its 15th year, NCI's Summit hit a record number of participants this March. What's even more exciting is Summit is becoming an industry-wide contractor conference. This was evidenced by the record number of first timers this year. More contractors are discovering high performance, and are attending conferences like Summit, at a time where many other conferences are experiencing lower attendance.

The High-Performance Revolution is growing stronger every day, as contractors are discovering a better way to deliver high quality work to their customers, while making the profits they deserve doing it.

NCI's Summit and this magazine have become tied at the hip, as they both have the same mission: to help move HVAC contractors forward on their high-performance journey.

If you didn't get a chance to attend this year's conference, stay tuned! We're putting together a virtual Summit where you'll be able to view the key general sessions, listen to the breakout sessions, and access content shared

by your Performance-Based Contracting peers. Look for more details on HVACToday.com over the next few weeks.

Are you a high-performance contractor? Would you be willing to share your successes -- and perhaps how you overcame failures or false-starts? We'd love to hear from you. Whether you are interested in being interviewed, or perhaps you'd like to contribute an article, please don't hesitate to contact us. [Click here](#) to send us a note or article submission request. Viva la revelución. 

performance: health, safety, comfort and energy efficiency.

As mentioned in our inaugural issue last November, this magazine is the voice of this growing group of contractors. And its voice is becoming stronger every day! **High Performance HVAC Today** now has more than 15,000 subscribers -- and counting. It is also attracting more and more contributing writers, including contractors, consultants, and coaches, who are willing to share their knowledge and expertise with our readers.

ATTENDANCE AT THIS YEAR'S HIGH-PERFORMANCE HVAC SUMMIT IN AUSTIN, TX WAS **PROOF POSITIVE** OF THIS GROWING MOVEMENT.



Revolutionize Your HVAC Business

The leading training organizations in the HVAC industry are teaming up to form a new alliance that will deliver unparalleled value to HVAC contractors and change the industry forever. Through this alliance, participating contractors will gain access to both NCI and EGIA premium member benefits and more!



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NCI Membership

Let NCI be Your Support Team on Your High Performance Contracting™ Journey



Your key to success in Performance-Based Contracting™ is a strong support network – always there when you need it. NCI helps its members overcome the typical hurdles associated with implementing the measured performance approach.

Call NCI Customer Care to learn how NCI Membership can take your HVAC business to the next level!

Looking to get even more out of your NCI Membership? Consider upgrading.

Upgrades will turbocharge your membership with added learning opportunities and financial incentives.

There are three options available, and they all include the basic membership benefits.

	NCI Membership	With Learning Excellence Online Package	With Learning Excellence Live Package	With Learning Excellence Premium Package
Unlimited Toll-Free Support	●	●	●	●
High Performance Talk Discussion Forum	●	●	●	●
Find-A-Certified Professional Lead Generator	●	●	●	●
i-NCI - Mobile Friendly Technical & Sales Tools	●	●	●	●
Hundreds of Technical & Marketing Downloads	●	●	●	●
Members-Only Newsletter	●	●	●	●
Article Library Featuring 100's of Technical & Business Articles	●	●	●	●
Live & Online Training and Conference Discounts	●	●	●	●
Member Rewards NCI Training Bucks on Purchases	5%	15%	15%	15%
NCI Online Store Discounts	●	●	●	●
ComfortMaxx Air™ - Airflow Testing Software	●	●	●	●
Unlimited Online Course Access		●		●
Unlimited Webinar Access		●	●	●
ComfortMaxx Pulse™ - Air & BTU Testing Software		●	●	●
Maximum Training Incentive Partner Program Dollars		●	●	●
Bonus Annual NCI Training Bucks Earned		\$1200	\$4200	\$4200
ComfortMaxx Verify™ - Full System Testing Software				●
Monthly Investment	\$100	\$450	\$450	\$750



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