

HIGH-PERFORMANCE HVAC TODAY™

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

Supplier Viewpoints: *Why Does High-Performance Matter?*



ALSO IN THIS ISSUE:

- NCI's Summit Takes A Personal Approach
- Total HVAC System Rating
- How to Stand Out in Sales and Marketing

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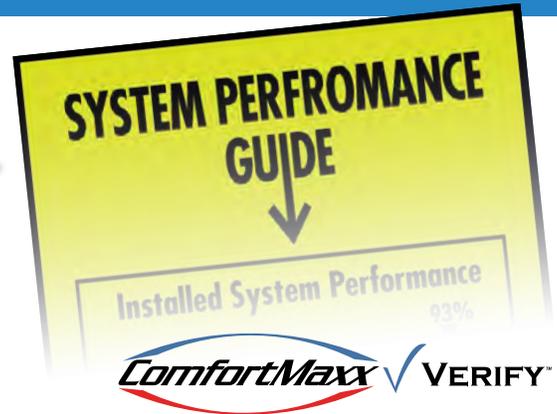


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HIGH-PERFORMANCE HVAC TODAY™

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It's Time for Your Pre-Summer Prep: Are You Ready?



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

For some contractors, especially those in the south and southwest, May is already heating up and throwing them into “Summer Madness Mode.” For the rest of the country, madness mode is coming. And fast.

For many HVAC businesses, spring is the slowest season. It is usually a time to get caught up from the chaos of the previous winter, take a moment to assess the current state of the business, re-stock inventory, and start planning for a busy summer.

It's during these “shoulder months” that business owners, who capitalize on this slow-down by putting together a game plan for the summer, will almost always come out ahead. Below are three simple strategies HVAC companies can use to get ready for the rush of summer.

Staffing Up: In this current job market, hiring technicians (ncilink.com/hiring) is challenging to say the least. The competition for hiring quality people is at an all-time high.

In preparing for summer you should look at

chaos of summer ensues.

Training Up: Training should be on-going, especially in the spring before the summer madness hits. Think about having some kind of program to get new hires trained as does Tom Hearn of Hearn Plumbing and Heating (ncilink.com/ICYMIO406). There are also on-going training options for existing team members (ncilink.com/ICYMI1216).

Training might even include using some of those golden nuggets you pick up from attending events like the **High-Performance HVAC Summit**. Take advantage of the slower time to go over your notes from such events, and maybe pick one or two things you can put into place quickly. This way it becomes routine when the busy season hits.

In this issue we have the key highlights from Summit to remind you of your time there. Plus David Richardson shares an article based on his Summit presentation, “Total HVAC System Rating Using ComfortMaxx Verify™.”

Marketing Up: Many marketing experts believe that direct mail postcards are effective for letting your customers know it's time to prepare for warmer weather.

If you already use social media to let your community know about your services, think about shifting your focus to let them know it's time to get their homes ready for summer.

Oh, by the way: those same marketing executives will tell you that promotion isn't always about what you sell. Its also about relationship building (ncilink.com/SM-VHP).

So are you ready for Summer Madness Mode? It's almost here for many of us and is already heating up for others.

Have a great busy season! 

SHOULDER MONTHS LIKE MAY ARE IDEAL FOR YOU TO PUT TOGETHER A GAME PLAN FOR SUMMER.

your seasonal data from years past to help you determine how many people you'll need this summer. Knowing the numbers will allow you to come up with a hiring plan so you can appropriately budget for hiring bonuses, additional benefits, or other perks.

It may also allow you to begin your hiring process earlier than your competition. That may give you a bigger talent pool from which to choose. It also has the advantage of bringing in new employees to train and learn your systems before the

Written by HVAC Professionals, for HVAC Professionals

NCI Certified System Performance Program

National Comfort Institute (NCI) launched a new program that allows High-Performance HVAC contractors to test residential system performance and then third-party certify those results. This allows contractors to **prove** that they are delivering high-performing systems to their customers.

NCI Certified System Performance is a complete package including software-based performance testing and physical certification materials.

To get started, you'll need at least one individual in your company certified by NCI in [Residential System Performance](#). It also requires a subscription to NCI's [ComfortMaxx Verify™](#) software.

Contractors can then purchase NCI Certified System Performance packets through **ComfortMaxx™** in increments of five. Each packet is good for one System Certification in either heating or cooling mode and is shipped to the contractor. They will also receive a customer-facing sales tri-fold, a customer brochure, and system certification labels.

To certify a system, the contractor performs a ComfortMaxx Verify test, typically after a new installation or renovation work is complete. ComfortMaxx performs automated quality assurance on test inputs and checks four key performance indicators: fan airflow, total external static pressure, equipment performance score, and system performance score.

If the system performance meets the required thresholds for silver or gold level

certification, the option to certify system performance is presented.

The contractor then enters the unique serial number for their certification packet to generate a digital certificate that the customer can access and print 24/7 at ncicertified.com.

Lastly, the contractor applies certification labels to the equipment and the process is complete. The customer now has peace of mind that their new or renovated system is performing in line with their expectations and has the 3rd-party certification to prove that, adding value to their home.

Contractors can learn more at ncicertified.net. 

-- By Ben Lipscomb, P.E.



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Supplier Viewpoints: Why Does High-Performance HVAC Matter?

The days and nights of every HVAC contractor are filled with challenges and concerns that include business worries, technical evolution, legislative changes, environmental issues, and more. Add to that the acute shortage of technicians and how to attract younger people into the industry.

During the 2022 High-Performance HVAC Summit held in Scottsdale, AZ, in March, the editorial team of this publication sat down with several key National Comfort Institute (NCI) partners. The goal was to talk about the importance of the high-performance approach and share ideas on everything from why they team up with NCI to helping contractors overcome issues.

This was the first time we held a roundtable event during Summit, and we wanted to share the results of these candid conversations with you, our readers.

Participants included:

- **Dominick Guarino** – [National Comfort Institute](#)
- **Colleen Keyworth** – [Online Access, Inc.](#)
- **Rodney Koop** – [The New Flat Rate \(TNFR\)](#)
- **Robin LeBaron** – [Pearl Certification](#)
- **Chad McAllister** – [R.E. Michel](#)
- **Ben Middleton** – [Goodman Manufacturing.](#)

The conversation began with us

asking our partners what high-performance means to them and why.

THE IMPORTANCE OF HIGH-PERFORMANCE

Robin LeBaron: For Pearl Certification, our goal is to help improve the US housing stock. Four-fifths of the U.S. housing stock was built more than 20 years ago. If you think that's before the era of modern code, you can see how much room there is for improvement.



What we want to push is having the best improvements possible. In that sense, we see our partnership with NCI as foundational. Why? Because NCI is driving where the entire contracting industry should go but is not there yet.

Chad McAllister: From a distribution point of view, our mission is to grow our sales, not warranty claim issues. We want to work with HVAC contractors who know how to install equipment properly and understand the need to test those installations to ensure they are working correctly, delivering the comfort consumers want, and saving energy.



We see the training and the approach to selling highly performing

systems that NCI espouses as a big plus for our contractors, their customers, and us.

Colleen Keyworth: We work with contractors to improve the digital aspects of their business, marketing, and technical best practices.



Around 80% of this industry consists of smaller contracting companies that won't grow without these best practices. Everybody wants to find that silver bullet, but they don't have the craft of contracting down well. That's part of a growth problem.

For Online Access, having a partnership with an organization like NCI that values training, building the craft, and providing those resources is very important.

Rodney Koop: To me, high performance means contractors know how to do the right thing for consumers and employ fully educated technicians in their trade. Without understanding this, contractors are less craftsmen and more laborers.

At The New Flat Rate, Inc., we understand that we are at odds with much of the industry. Too many contractors don't understand the importance of how to price their work properly. Many don't





even care. There is much lip service regarding the truth and quality of how well systems operate. That has to change.

CHANGES KEEP COMING

Ben Middleton: It's no secret that we live in a time of accelerated change and transformation. Think about all the technological advancements, globalization, and other factors that are accelerating change throughout the world.



Our industry has been shielded for a long time because North America is the only place that primarily uses ducted systems in residential applications.

Now you see manufacturers from all over the world importing non-ducted solutions in a quest for better efficiencies. You also see significant changes in regulations that impact the entire HVAC supply chain.

With all that going on, contractors need organizations to help them adapt. For example, just because a contractor can work on a ducted system doesn't mean they know how to install a geothermal system. Just because they can work on a geothermal system doesn't mean they can work on a hydronic system.

There are so many technologies today that nobody can be expert in all of them. Contractors need help. I see the HVAC Industry evolving into one made up of specialists, just like in the medical industry. They have general practitioners who refer us to specialists to get at the root of whatever medical issue we are having. I see that happening in the HVAC

Industry as well. That is an evolutionary change from how this industry has always worked.

So even with all the changes flying at this industry, I feel that contractors need to return to the industry's original focus: being a skilled trade.

CHANGE ADAPTION MEANS PARTNERSHIP

Robin LeBaron: I completely agree with Ben. I would add in the need to develop best practices and training contractors on how to adopt these skills.

I love that NCI is a training ground for contractors. They may be at the small end of the spectrum, but they're hungry for growth and want to do it in the right way.



That's exciting because our take on the industry is that the top end of the spectrum is not nearly as large as it should be to meet the growing demand. NCI is helping to solve that problem. That helps us as well because we want better contractors in our network.

Chad McAllister: That very much falls in line with what we're looking at as a distributor. NCI attracts top-level contractors, as do most best practice groups. We hope that supporting such groups helps them attract more people into the high-performance realm.



We need more contractors to see performance as testing, measuring, and diagnosing HVAC systems, then verifying their results and fixing problems. That is an important

dynamic that goes well beyond just installing equipment.

As an HVAC distributor, we love people who install HVAC systems, but we love them even more when we don't have warranty or other problems with their work.

Colleen Keyworth: In addition to all the technical expertise, contractors also need best practices for business and marketing. Having a well-rounded business approach helps



contractors set themselves apart from competitors and do what they must to stay on top of their game.

Ben Middleton: As an equipment manufacturer, it is natural for our focus to be on the product. But at a recent NCI conference, Goodman's Global Group president Satoru Akama said that manufacturers take pieces of metal and plastic and put



them together into a box. He then said it's the HVAC contractors who bring systems to life.

I think that is so very true. I also believe that what gives our equipment its reputation and allows us to offer the types of warranties and support that we do is the expertise in the field.

But there are challenges to this. The United States is one of the least HVAC-regulated countries globally, making it very easy for anyone to become a contractor. That has its pluses and minuses. One of the negatives is that consumers have little protection.

It's not plug-and-play. Manufacturers rely on contractors primarily

for assistance to make systems work. That is why we need different certifications and different levels of recognition so that homeowners and other people can see the quality and be confident they are getting what they pay for.

THE GOVERNMENT, UTILITIES, AND MORE

Robin LeBaron: I find it very interesting to speak of certifications regarding the high-performance approach. Why? Because its path leads toward energy savings. Energy savings is a sticky wicket.

We've spent a lot of time *not* playing in the energy savings public policy space. Instead, we focused on developing a market-based model because we think that's the right basis on which to build.

However, what has been happening at the federal level over the last year has made us revisit our market-only approach. The government is focusing tremendous resources on energy savings. That is happening on two dimensions: how to reduce overall energy consumption and reduce consumption at times of peak load, which is what utilities care about.

This government focus creates further opportunities for NCI and Pearl to collaborate because the public policy space needs to be more aware of the impact and benefits of high-performance HVAC contracting.

Chad McAllister: As far as the high-performance contractor is concerned, I think it will have to be the standard. Twenty years ago, when I got into this business, contractors

used the "beer-can-cold" rule for installations. Back then, we could put six 10-SEER condensing units in the back of a pickup truck, slam them into six houses, and feel like we had good installations if the air coming out of the registers was beer can cold.



Now through legislation calling for 13 SEER minimums, high-efficiency products have become more complicated. I am talking about the use of inverter drives, variable refrigerant flow technologies, etc. Today, we are looking at the new SEER Two standards and A2L refrigerants. The margin for error is so slim that contractors who aren't using best practices will be left on the sideline.

And I'm talking about best practices like those taught by NCI – testing, measuring, and diagnosing issues using data. I feel that if contractors don't train in these things, there will come a point when they cannot keep up and stay in business.

Robin LeBaron: Another huge factor in all of this is the move toward all electrification. That accentuates everything Chad just said. It adds to the complexities of HVAC contracting. As I talk to state officials about such policies, I still hear a lot of interest in consumer rebates. This approach is the age-old method for helping customers afford higher-efficiency products. But it doesn't necessarily work and so programs come and go.

In my opinion, the testing-in and testing-out approach of high performance should be an important part of public energy savings initiatives.

Colleen Keyworth: Generally, homeowners don't care unless it affects their pocket-books. Utilities would have to provide several rebates or savings each month to get real consumer attention. Otherwise, consumers will always default to price.



PRICING, PRICING, NOT PRICING

Ben Middleton: I think the big message we should get out to the contracting community is that it's *NOT* pricing; it's *affordability*. We can talk about affordable quality with financing instead of being worried about sticker shock.

This industry has been so resistant to financing. If you look at every other industry – automobile, furniture, roofing, and window industries, for example – each embraces financing wholeheartedly. For whatever reason, the HVAC industry has a hard time with the idea of talking about payments versus the big ticket.

What it comes down to is comparing actual performance to equipment design. Homeowners won't get promised efficiencies or Btu capacities if contractors don't install everything correctly. When that happens, the customer will be unhappy.

This leads to 95% of the warranty calls that we process being *installation-related*. They are not *equipment-related*. So I think the idea of high-performance contracting is having the skills necessary. And I reiterate that this goes back to the



concept of specialization because of how complex everything is today.

Colleen Keyworth: As true as that is, it is all for nothing if contractors don't price their work correctly. We find very few HVAC contractors are charging what they should.

WORKING TO MOVE MORE TOWARD HIGH PERFORMANCE

Robin LeBaron: The proper pricing issue is a fundamental problem and crucial for all stakeholders in the industry to work on together. Contractors must become better at pricing their work.

Rodney Koop: For high-performance contractors to be effective in the long term, they must be able to make money. Flat rate pricing is one

way, but even that isn't effective if contractors don't understand current retail selling methods.

What does that mean? Retail thinking is based on what value a contractor brings to the table and what price the market will bear. On the other hand, wholesale thinking is based on marking up the cost.

Robin LeBaron: It also has to do with customer education and ensuring that they see the high-performance contracting approach as an investment that will generate a return after selling the house.

As homeowners ourselves, we have an eye toward resale when thinking about making improvements. This is true when replacing kitchen cabinets or putting in a pool or a master

bedroom. None of us really thinks about resale value in terms of insulation, air sealing the HVAC, and so on.

I recently read about widespread, massive buyers remorse. Everybody buys sight unseen, and then they're like, 'what the heck did I buy?'

Having something like the system certification that NCI is now offering can help change that. I think there is an opportunity to change the equation and raise the bar in contracting.

Rodney Koop: High-Performance HVAC contractors are the cream of the crop in quality practices. But they are outnumbered by bigger companies. We want to see that change. That can only happen if we work better together and if everyone in the supply chain does too. 

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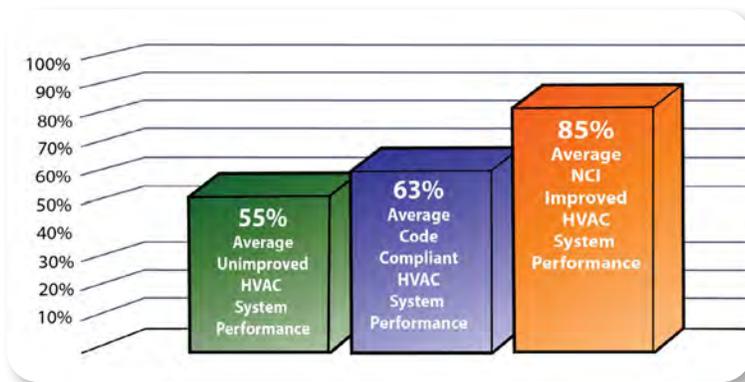
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Total HVAC System Rating with *ComfortMaxx Verify*™

One of the most significant challenges our industry faces is understanding the difference between HVAC equipment and the HVAC system. Many contractors and their customers believe the equipment and the system are the same. They assume a 95% furnace and 22 SEER condensing unit automatically perform at their rated efficiency once installed.

HVAC system rating and verification sheds new light on this assumption. System rating and verification reveal contractor craftsmanship and installation conditions' influence on the installed HVAC system. Let's look at what's involved in an HVAC system rating and how *ComfortMaxx Verify*™ ties in.



THE IMPORTANCE OF HVAC SYSTEM RATINGS

The HVAC industry is one of few specialized professions that designs and field assembles multiple mechanical components to create an HVAC system. This task is quite an undertaking since various people with different roles ensure everything works in unison.

To deliver what you promise and what your customer pays for, you need a way to rate your installations. In its simplest form, an HVAC system

rating looks at the total heating or cooling Btus the HVAC system delivers into the living space. Then you compare them to the amount of Btus the equipment produces under tested conditions.

A rating considers all the variables, from proper design to the installation conditions. It looks past the laboratory-rated efficiency of the HVAC equipment. An HVAC system that achieves a rating over 90% is doing an exceptional job. But in some locations, like attics, that result is hard to achieve.

HVAC system ratings provide an HVAC system assurance policy. It gives your customers the confidence that the equipment they purchased operates as intended. In addition, it gives you a way to set yourself apart from your competition, which only focuses on the yellow labels and equipment laboratory ratings.

Adding software, such as *ComfortMaxx Verify*™, provides third-party credibility so you can focus on results instead of assumptions. It is the craftsmanship litmus test that proves how well your HVAC systems perform.

EVERYONE IN YOUR COMPANY DETERMINES THE HVAC SYSTEM RATING

It takes everyone in an HVAC company to achieve an acceptable HVAC system rating. There isn't one person who holds all the responsibility or anyone who can become the scapegoat.

HVAC system ratings start with company owners and management. If they don't decide it's essential to assure their installed systems work as designed, the steps to rate the system will never happen.

Company leaders must instill system performance as a culture. No one else can do it. If they believe in the benefits and opportunities in rating system performance, they can share the vision

with everyone. From there, the concept catches on throughout the company.

Salespeople have an enormous responsibility in system performance ratings. They must know how to offer the right options, not just gather nameplate information off existing equipment and then quote the same-sized replacement. Their view must expand beyond the equipment and look at what it's attached to.

Installation crews determine how well the equipment performs. Their work influences system performance more than anyone else. An excellent installation crew will get great results. Bad installations can't hide once you add system ratings to your jobs. It's the ultimate form of quality control.

Service and maintenance technicians discover conditions that lead to poor system performance and generate leads for the company to serve their customers better. They test, diagnose, and prescribe solutions for any hidden defects they uncover. Without their hard work to discover poorly performing systems, there is no opportunity to solve long-standing customer issues. Problems remain hidden unless technicians make the defects visible through testing.

The office staff also needs to understand there is more to HVAC than just equipment. There are schedule tweaks to make and new services to offer that improve the way things are done. In addition, the ability to improve system performance and verify it through ratings helps to remove the seasonal nature of the HVAC Industry.

When the busy season slows down, there are always poorly performing duct systems needing help. The office staff can coordinate these jobs at

slower times and keep everyone working throughout the year.

Your customers ultimately decide system performance ratings. If they ignore the necessary duct upgrades you recommend, there's no way they can get the results they desire. Customers



decide how well they want their equipment to operate by confronting system issues that will keep it from performing as designed. It's your responsibility to inform customers of problems. But it's their responsibility to make an informed decision once you provide the facts.

RESOURCES TO RATE TOTAL HVAC SYSTEM PERFORMANCE

Since delivered Btus are the heart of an HVAC system rating, you need resources to measure, compare against, and capture the information.

The three resources you need are test instruments, system documentation, and technology to capture test results.

First, let's look at the test instruments you will need to rate system performance.

- **Manometer** (Analog/Digital) – to measure system static pressures
- **Air Balancing Hood** – to measure

airflow from each supply register and return grille

- **Anemometer** (Thermal/Hot-wire/Rotating Vane) – to measure air velocity and calculate airflow from registers and grilles you cannot measure with a balancing hood

- **Thermometer/Psychrometer** – to check equipment and system temperature and enthalpy change.

You will also need documentation to rate system performance. It's best to keep information in one location so it's easy to reference as you measure the system.

- **Equipment specifications** – to compare your field measurements against. They are the baseline for your readings. Without them, you're guessing at the Btu targets needed for an HVAC system rating

- **Floor plan and duct schematic** – for a visual reference of the room's, system conditions, and the duct sizes attached to them.

- **Load Calculation or Estimated Room Airflow** – to provide airflow targets to compare individual supply airflow and Btu measurements against.

Finally, you need the right technology to capture test results.

- **A tablet or laptop with internet access** – to input your system information and measurements into ComfortMaxx Verify

- **A ComfortMaxx Verify Subscription** – to perform the HVAC system rating calculations and generate reports.

Once these resources are in place, you need to make sure the skills are also in place to capture the information. Software is only as good as the data you put into it.

SKILLS YOU NEED TO RATE TOTAL HVAC SYSTEM PERFORMANCE

Now that you have a list of resources, you need to ensure your team has the essential skills. Before any testing begins, a certified technician must gather all the equipment and system information.

Much of the information should be on file, such as equipment nameplate data that includes model numbers, airflow capacity, and maximum rated TESP (Total External Static Pressure). Other information, such as fan speed settings and filter sizes, might not be accessible until the testing technician is on the job.

It takes a knowledgeable, well-trained technician to test and measure the system to obtain the correct information. The testing technician should be able to measure:

- Static pressure at the equipment
- Airflow from the equipment and system
- Temperature from the equipment and system.

Once the technician has these measurements, they must be able to interpret the readings to assure nothing is out of line or missed.

There are a lot of measurements recorded simultaneously, so it's easy to miss something, test out of sequence, or measure in the wrong location. Some test results to interpret include:

- Assuring the equipment type and capacity are correct
- Using static pressure diagnostics to identify readings that don't make sense or might be higher than expected
- Conducting airflow diagnostics at the equipment and system to assure the readings are in line with other system measurements



- Using temperature diagnostics at the equipment and system in case there is an issue with refrigerant charge or combustion on a gas furnace
 - Identifying other factors affecting system performance, such as excessive attic temperatures or abnormal return temperatures on a new startup.
- If all the measurements are in line and make sense, it's time to input your readings and information into ComfortMaxx Verify. If something doesn't line up or is off, you'll need to investigate, diagnose, and correct

these issues before you continue. They may affect the HVAC system rating.

COMFORTMAXX VERIFY™ IS THE HVAC SYSTEM RATING ENGINE

As you input data into ComfortMaxx Verify, it does the rest. It is the engine that provides all the calculations to rate HVAC system performance. ComfortMaxx Verify collects:

- **Customer information** – a permanent record in the cloud of your customers' HVAC system information
- **Location information** – matches equipment and systems to specific locations in a home with more than one HVAC system. You can rate each system for each location
- **System information** – keeps a record for past testing as a comparison to future measurements to assure the system remains operating in the best condition possible
- **Test results and calculations** – static pressure, airflow, temperature, and Btus are captured and compared

David Richardson was a Presenter at NCI Summit 2022

This article is based on a presentation by David Richardson at National Comfort Institute's 2022 High-Performance Summit in Scottsdale, AZ. The session was titled, "Total HVAC System Rating with ComfortMaxx Verify™."



In this session, David showed High-Performance HVAC contractors how to prove the performance of field-installed systems.



If you missed Summit 2022, no worries — we plan on running content based on presentations throughout the year.

David Richardson is NCI's director of technical curriculum development and an instructor. You can reach him at ncilink.com/ContactMe with any questions.

And don't take a chance on missing Summit 2023. It will be held in Branson, MO from April 16 - 20. Be sure to save the date.

SYSTEM PERFORMANCE GUIDE

to equipment and system specifications to create a final rating of the installed HVAC system independent of the HVAC equipment rating.

The great thing about an HVAC system rating is it's something only your company can provide. It isn't a cookie-cutter rating. You can't just check the boxes on a list, and the system passes. Instead, it's connected to the craftsmanship and skills you bring to the job. Unless your competitors do their work exactly like you, they can't repeat the results.

CHALLENGES AND OBSTACLES TO OVERCOME

Learning anything new usually comes with its difficulties. HVAC system rating is no different. Change

almost always comes with resistance.

If you're considering adding HVAC system ratings to your offerings, think about where you're going and how you want to get there. Most people plan vacations months in advance. You're planning to improve how you do business, so give it some thought and preparation.

Directions from a map are essential to a vacation. As you add HVAC system ratings, you also need a **MAP**. Each letter of MAP means something you should think about as you plan this commitment.

- **Motivation** – why I should care and do this. Know the reason why
- **Awareness** – what this will affect and what results to expect. Understand the benefits or consequences

- **Plans** – what to do about it and how to do it. Decide on action steps.

Once your team understands your motivation behind rating system performance and is aware of the benefits, they can help you layout the necessary plans and become part of the movement instead of holding back progress.

Use the **MAP** concept to help you determine a destination and understand that you will need to detour occasionally to pass around an unexpected obstacle or challenge. If you encounter them, that's a good sign you're moving in the right direction. If providing real HVAC system performance results was easy, everyone would do it. Only the elite have what it takes to move ahead of the industry. **NCI**





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NCI's High-Performance Summit Takes a Personal Approach

High-Performance HVAC contractors took center stage in Scottsdale, AZ, on March 28th as National Comfort Institute's (NCI) 18th Annual Summit got underway. Nearly 100 contractors, preferred partners, and other industry luminaries gathered after a three-year hiatus from in-person meetings due to the COVID-19 pandemic.

NCI was pleased to welcome, [The Women in HVACR](#) organization, which held their regional conference in conjunction with the High-Performance HVAC Summit 2022.

This year, the focus centered on a **This Time It's Personal** theme. Once again, Summit was open to the entire HVAC Industry with the intent of shining a spotlight on like-minded people willing to share their high-performance experiences with peers.

This approach allowed conference attendees to personalize their experience based on their knowledge and comfort level with each topic. Each topic offered three options:

- **NOVICE:** For those who are at the beginning of a specific discipline

- **PRACTITIONER:** For attendees who are practicing skills and want to take things up a notch – or just need a refresher course

- **MASTERY:** Contractors who choose this option are already proficient in a specific area and are looking to move to the next level.

Excitement radiated even during the pre-conference boot camp conducted by Goodman® Air Conditioning and Heating and during the two recertification classes held by NCI on March 28th.

Then it was three days of seminars, networking, and social events, including the yearly awards dinner and banquet.



Dominick Guarino during the Opening General Session.

Photo courtesy of Dennis Mondul, © 2022, Scottsdale, AZ



The Women in HVACR held their regional conference in conjunction with NCI's High-Performance HVAC Summit 2022.

THE WORKSHOPS

Summit 2022 included 18 workshops taught in six sessions by High-Performance HVAC expert trainers from National Comfort Institute. Some of the many sessions included:

- Airflow Diagnostics and Air Upgrade Workshops
- High-Performance Sales Workshops
- High-Performance Implementation
- Take it to the Next Level with High-Performance Software
- High-Performance Town Workshops
- Carbon Monoxide and Combustion Workshops.



We-Ko-Pa

2022 Summit Highlights



All photos in this article reprinted with permission. © 2022 Mike Weil, Cleveland, OH

GAMES, IDEA SHARING, AND COACHING

The Opening General Session kicked off Tuesday morning, March 29th. All attendees were treated to a



Dawn Mroczek of GV's Heating & Cooling and Will Horner of Canco Climatecare® compete in the *Reach for the Summit* game.

rousing multimedia introduction, followed by an interactive game show called "**Reach for the Summit.**" All general sessions took place in the same room with the Preferred Partner Trade Show.

The game show began with selecting two random contractors from the audience to answer multiple-choice

questions from real-world installation and service scenarios.

The audience then had the opportunity to vote via the NCI Summit 2022 mobile app for the answer they thought was correct. The contractor contestants earned points for correct answers, with the winner taking home a new **NSI 6000 Low-Level CO Monitor.**

After contestants offered their answers, the audience voted, and then follow-up commentary was provided by **David Holt** and **David Rich-**

ardson, who discussed the merits of each answer.

The winner was **Dawn Mroczek of GV's Heating and Air Conditioning.** Coming in second place was **Will Horner of Canco ClimateCare.** He received an Amazon gift card.

After the morning breakout workshops, contractors reconvened for the

popular contractors-only Idea Meeting, hosted by **Michael Greany of Aire Rite® Air Conditioning and Refrigeration** and Mike Weil of NCI. This meeting was divided into two 45-minute sessions: one dedicated to High-Performance Lead Generation, the other one to Sales.



Contractors visit with NCI vendor partners during the trade show.

Attendees presented their ideas on each topic and then voted for those



Rob Falke (left) and Dominick Guarino (right) present the Small Contractor of the Year award to Ken Dean, *Dean Heating and Cooling*.



Hearn Plumbing, Heating, and Air Conditioning receives the Medium Contractor of the Year Award. Pictured left to right: Rob Falke (NCI), Matthew Griswold, Tom Hearn, and Dominick Guarino (NCI).



Don Langston of Aire Rite (center) receives the Large Contractor of the Year Award from Rob Falke (left) and Dominick Guarino of NCI.

they felt were the best. The winning ideas were from:

Lead Generation: A tie between **Earlene Marron of Airtech Air Conditioning** and **Chuck Worley of Worley Home Services**.

Sales: **Dawn Mroczek of GV's Heating and Cooling**.

PARTNER TRADE SHOW

Eighteen exhibitors managed their table-top displays all around the general session ballroom, so contractors had the opportunity to talk with them during breaks and regularly scheduled trade show hours.

Exhibitors also participated in NCI's annual Preferred Partner Prize Drawing. Plus, attendees qualified for great prizes by interacting with NCI's partners.

STATE OF THE HIGH-PERFORMANCE HVAC INDUSTRY

Thursday morning, March 31st, the morning general session was headlined by NCI CEO Dominick Guarino who discussed the state of the High-Performance HVAC Industry and NCI's role in it.

He said, "The High-Performance Industry is growing. The term, High-Performance Contractor is being used more and more within our industry – even by other organizations, manufacturers, distributors, utilities, and even government agencies."

Guarino added that delivered performance is increasingly on the lips of many in the HVAC industry. "They see it as the next sea change that can make systems work better and save energy more than anything else we can do.

"Plus, homeowners are increasingly seeking out companies that can help



Kent Donnelly (center) of Tetra Mechanical Services received NCI's David Debien Award for Technical Excellence.



Vic Updike (center) of Masterworks Mechanical received NCI's John Garofalo Implementation Excellence Award.



John Boylan and James Croley III (center) of Lakeside Service Co. received NCI's Scott Johnson Training Excellence Award.



Michael Hyde (center) of Hyde's Air Conditioning was honored with NCI's High-Performance Sales Award.

them solve long-standing performance issues,” he added. “There is no better time than now to tell the world about what makes you different and that you not only promise to improve the safety, health and comfort of people’s homes. This is a great opportunity for every contractor in this room.”

AWARDS AND RECOGNITIONS

The highlight of every Summit is the presentation of NCI’s annual awards to deserving High-Performance Contractors from around the country. This is the 18th year that NCI has recognized excellence in the Performance-Based Contracting™ industry.

Each year, NCI presents three *Contractor of the Year Awards* based on company size – **Small** (less than



Photo courtesy of Brian Roseman, ©2022, Cleveland, OH

Summit 2022 attendees participated in NCI’s Performance Town where they had an opportunity to test their skills at conducting static pressure testing, test port installations, airflow measurements, and more. Performance Town used live, functioning equipment and duct systems so contractors could do hands-on real-time testing.

\$2 million in volume), **Medium** (\$2 to 6 million), and **Large** (more than \$6 million).

Winners include:

- **Small Contractor of the Year** — Dean Heating & Cooling, Athens, OH
- **Medium Contractor of the Year** — Hearn Plumbing & Heating, Madison, OH
- **Large Contractor of the Year** — Aire Rite, Huntington Beach, CA.

In addition, NCI recognizes individuals for their contributions to the High-Performance HVAC industry. These awards and the winners include:

- **David Debien Award for Technical Excellence** — Kent Donnelly, Tetra Mechanical, Simi Valley, CA
- **John Garofalo Implementation Excellence Award** — Vic and Amy Updike, Masterworks Mechanical, Craig, CO
- **Scott Johnson Training Excellence Award** — John Boylan, Lakeside Service Co., Brighton, MI
- **High-Performance Sales Excellence Award** — Mike Hyde, of Hyde’s Air Conditioning, Indio, CA
- **Industry Partners Award** — Rodney Koop and John Ellis, The New Flat Rate, Dalton, GA.

The highest award NCI gives out recognizes a contractor who is a strong supporter of NCI and its mission, who implements all aspects of NCI’s methods of service, sales, and installation,



Greg Vickers (center) of GV’s Heating and Cooling received NCI’s prestigious Chairman’s Award.

and who goes above and beyond when it comes to advising NCI regarding ideas, energy, and time.

This award is known as the **Chairman’s Award**, and this year’s recipient was **Greg Vickers, GV’s Heating and Cooling, Glenview, IL.**



The Industry Partner Award was presented to Rodney Koop and John Ellis (center) of The New Flat Rate by Rob Falke (left) and Dominick Guarino (right).

MARK YOUR CALENDARS

Mark your calendars for April 16-20, 2023. That is when Summit 2023 happens. The High-Performance HVAC Industry will descend upon the Ozark mountains at the Chateau on the Lake in Branson, MO.

Stay tuned for more information on pricing and registration. 

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.

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Standing Out in Your Market with High Performance

When it comes to marketing and selling your High-Performance HVAC services, it isn't all about the technologies you use or products you install. It's about communications and relationships. It's about listening, gathering information, and finding ways to solve customers' comfort, health, and energy problems in their homes and businesses.

According to sales and marketing guru Chet Holmes, "You will attract way more buyers if you are offering to teach them something of value than you will ever attract by simply trying to sell them your product or service."

To see how many readers of High-Performance HVAC Today market and sell their services in

this manner, we surveyed the 15,000-subscriber base last month. Here are some things they told us:

First, of all the respondents, 83% are HVAC contractors, and 66% spend the time and money to train from

half to all of their technicians in the technical tenets of High-Performance HVAC. These technicians test, measure, and diagnose every HVAC

system they touch in the field – from both a service and installation standpoint.

DATA COLLECTION

High-performance technicians collect information that results from testing and measuring in several ways. Respondents tell us [data collection](#) includes writing the data down on paper (55.6%), using a mobile app like [AirMaxx™](#) or [AirMaxx Lite™](#) (33.3%), using software like [ComfortMaxx™](#) (11.1%), or using some other digital means for capturing data (44.4%).

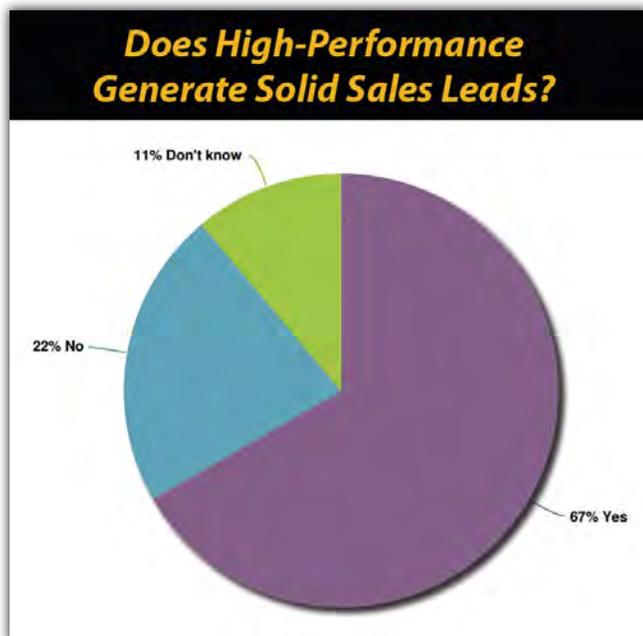
Respondents told us that using apps or software helps them crunch the numbers more accurately and provides them a means for communicating results to their customers in an easy-to-understand fashion. Only around 22% said they take photos of customers' systems, then sit down and share the pictures and discuss what they show with their customers. Some choose to share that information after the visit (33%) or during the visit using printouts or PDFs on mobile devices (44%).

Our survey also shows that 55.6% of respondents include high-performance HVAC testing and measurement activities in their [service/maintenance agreement programs](#).

MARKETING APPROACHES

While so many marketing experts and consultants heavily promote the idea of sending messages to consumers through digital media, nearly most of the high-performance HVAC contractors who responded to our survey still focus on more traditional marketing and promotional techniques:

- 88.9% depend on word-of-mouth marketing, and 22% say they like to use local





newspaper and magazine advertising to promote their company and its services

- 33% say that leaving brochures and pamphlets provided by third-party experts not only helps justify high-performance contracting, but also is an excellent add-on to the data points from testing and measuring
- Social media and other digital marketing approaches (email, blogs, electronic newsletters, and so on) are used by just over 44% of our respondents.

DOES THE MESSAGING WORK?

Based on their marketing, 56% of survey respondents say their high-performance sales closings are increasing. Still, the biggest pushback from consumers they hear is about

affordability. More than half the respondents say their customers tell them their prices are too high.

The next biggest pushback is that consumers tell them no one else talks about high performance. In fact, consumers say that respondent competitors erroneously tell consumers high performance is just a way to increase prices and make more money.

Countering such pushbacks can involve things like offering:

- **Financing** (adds more value to a sale)
- **Discounts**
- **Duct renovations and air upgrades** in stages (a Chinese restaurant menu approach)
- **Follow-ups.**

Sixty-seven percent of respondents say that their High-Performance HVAC approach generates solid sales leads.

of your business. It affects everything from company revenues to employee pride, from the number of growth opportunities to the types of potential employees you can hire.

Our survey backs this up. Those respondents who depend on word-of-mouth marketing say the better their reputation, the stronger word-of-mouth marketing goes.

A large percentage of those who use social media marketing (68%) say that they track their online reputations using Google, and just over 11% use some other medium to track it.

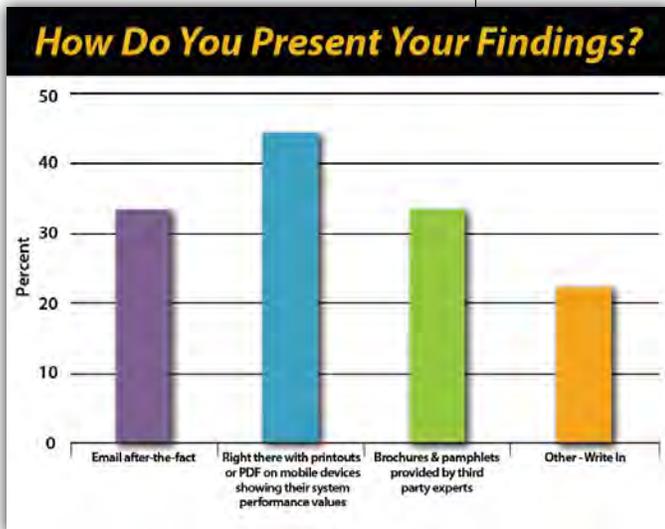
Of those who market digitally, 56% of respondents specifically use social media to get their message out. They break down their use of social media as follows:

- 60% use it for promoting specials
- 80% use it to push company/industry news and customer feedback
- 40% for marketing messages.

Eighty-nine percent of them push their social media messages through Facebook, 44% through Twitter, and 22% through LinkedIn.

WHY DOES SOCIAL MEDIA MESSAGING WORK?

More than half of the respondents who promote using social media say it works for them because of the buzz it creates. **Michael Greany** of Aire Rite® Air-Conditioning and Refrigeration



THE ROLE OF REPUTATION

Benjamin Franklin once wrote that “It takes many good deeds to build a good reputation, and only one bad one to lose it.”

Many experts and consultants say that reputation is the most critical aspect

in Riverside, CA, says, “Social media campaigns that promote our air upgrade and duct renovation work get people talking.”

Furthermore, **Greg Steger** of Greg Steger Heating and Air, Plymouth, WI, says, “through our social media campaigns, we share information that no one else does. To our customers, this shows that we care.”

“Because of our promotions and messaging through social media, we educate our customers. They are beginning to understand what air upgrades are,” says **Dwayne Ashley** of Polar Bear Air Conditioning in Georgetown, Cayman Islands.

Several of our respondents are still working through proper pricing and messaging issues, but by and large, they say these are issues they hope to overcome very soon.

From a customer standpoint, the contractors who responded to this survey tell us their customers often say the results really matter. In fact, 67% say customers tell them that they see the High-Performance HVAC approach solving issues that no one else could solve before.

Another typical comment respondents get from their customers is that they see a marked improvement in their indoor environments and don't mind spending more on quality. They like to know what is really happening with their HVAC systems.

SUCCESSFUL AIR UPGRADE AND DUCT RENOVATION SALES

Success seems to revolve around two factors. One is focused training of field service and installation technicians in the art and science of High-Performance HVAC. The second is getting the word out about what makes your company different.

Mike Greany of Aire Rite said, “People can't buy what they are not offered. When we deliver the comfort, energy efficiency, safety, and health benefit we promise, and then prove it, we truly stand out from our competitors.”

Quentin Collins of Day and Night

Heating and Air Conditioning, Fayetteville, NC, concurs. He told us, “Our techs have improved educating customers, increasing our average sales tickets. This is a win for the customer and a win for our company.”

Success isn't only closing the sale, however. According

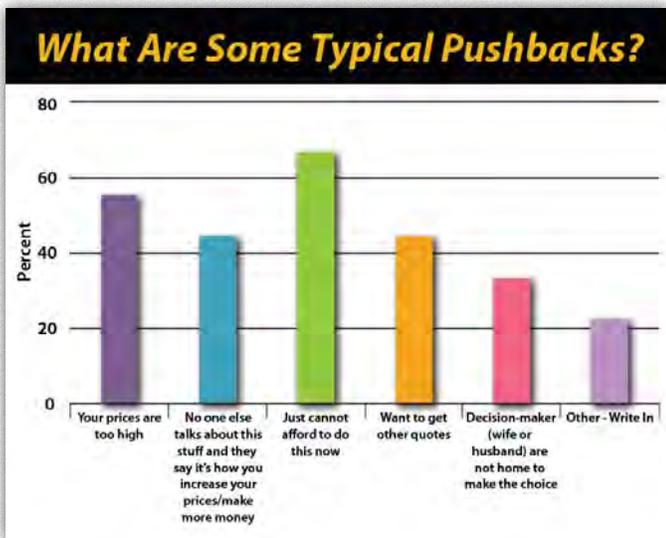
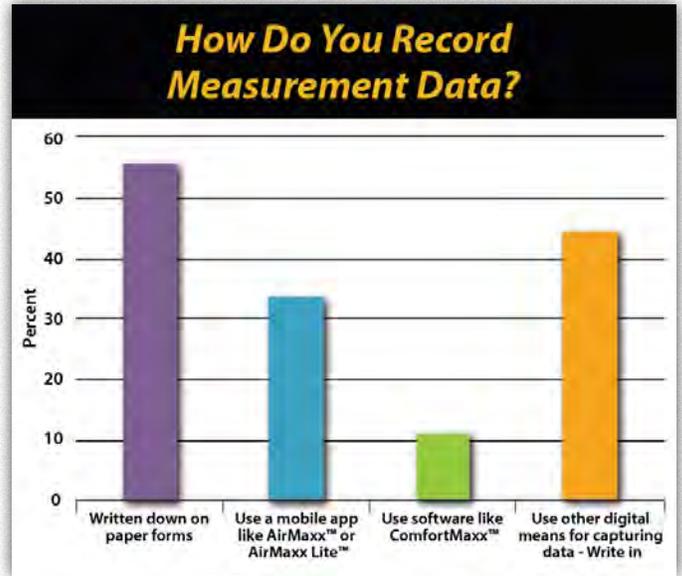
to some comments from survey respondents, it is delivering on promises, proving it, and having delighted customers.

Service technician **Travis Tordoff** of Aireserv® of the Gold Country, Valley Springs, CA, says, “Customers who follow through with a plan we draw up often talk to their friends and family and tell them that we do a good job. It's not technical, but it gets the word out that properly designed systems give comfort while helping to keep energy costs down.”

From word-of-mouth to creating a learning experience, contractors like you can create “WOW” experiences for customers through high-performance training, educate their customers through marketing, and deliver what they promise. There is no better differentiation factor out there. 



Brian Roseman is the marketing and multimedia manager for National Comfort Institute. His responsibilities include managing the marketing department, information technologies, photography, video production, and website development and maintenance. For questions about this survey, you can reach him at ncilink.com/ContactMe.



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Members: Get Your May 2020 PowerPack!

NCI membership has its privileges.



One of those privileges is something we call the **PowerPack**. Each month NCI curates items just for members to help them as they grow their High-Performance HVAC business.

Some of the tools included each month may not be normally accessible with your membership subscription package.

However, you will be able to access

If you have any questions, or if you are unable to access any of the tools in this program, please contact your Customer Care team at 800-633-7058.

More From NCI's Online University

Over the years, National Comfort Institute has built and grown a library of Online University courses that your team can take remotely, on their own schedule. Many contractors use these online courses to keep themselves up-to-speed on the tenets of High-Performance Contracting.

From owners to office staff to field techs and everyone in between, the NCI Online University has something for everyone in your HVAC company - at all

covers the fundamentals and explains:

- Which measurements you should take and how to take them
- How to recognize which numbers to record
- How you can make a diagnosis based on your measurement results
- How to make recommendations based on your diagnostics.

This series also talks about how to repair and renovate systems based on your recommendations.

Learn more about this course by going to ncilink.com/SPT.

Along with technical topics, the NCI Online University also features some business and selling modules you can use to keep your CSR skills well-honed.

NCI also offers **Business Management 201** series of courses. From the ABCs of supervising others to team delegation and coaching, this series of modules will help your team in their various roles in making High-Performance HVAC contracting work for your company.

Get more details on each of the modules by pointing your browser to ncilink.com/BM201.



WHAT'S NEW AT NATIONAL COMFORT INSTITUTE? FIND OUT ABOUT NEW PROGRAMS, EVENTS, AND TOOLS, ALL AIMED AT HELPING YOUR HIGH-PERFORMANCE BUSINESS SUCCEED.

these valuable tools through the PowerPack portal during the current month.

So, without further ado, let's drill down and take a look at the May 2022 PowerPack, which focuses on preparing for the cooling season:

- **How To Perform a ComfortMaxx™ Quick Test (Webinar)**
- **NCI Generic Cooling Capacity Table (Download)**
- **Performance Tune-Up Postcard (Download)**
- **ComfortMaxx™ Field Data Collection Report for Residential Split System (Download)**
- **The Curse of Hot Weather (Article).**

learning levels.

These courses are created by the team here at NCI and are focused on helping your organization succeed and grow, at your pace. If you're just starting out, or have been in business for decades, there's training that you will find helpful on your path to performance.

This month we focus on one of NCI's advanced technical training modules: **System Performance Testing**.

This series provides your team with an introduction to system performance and



Remember, the NCI Online University is available 24/7 to help keep your team focused and striving for the best. As we mentioned, membership has its privileges, NCI Members get discounted, or even free online university access.

If you have any questions, be sure to call the NCI Customer Care line at 800-633-7058.

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**Editor-in-Chief and
Associate Publisher**
Mike Weil

Art Director
Judy Marquardt

Online Development Director
Brian Roseman

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Dominick Guarino
is publisher of
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He can be reached
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Condensing units are already starting to kick on in many parts of the country, and it's just a matter of time before equipment starts breaking down.

Before you know it, your service technicians will be running the wheels off their trucks trying to respond to service requests. Unfortunately, this is also the time when there is a strong temptation to stop testing system performance and just triage the service calls in front of you.

Most contractors fall into the trap of letting service techs put off air-side test procedures because there are too many calls to handle. The truth is it only takes five minutes to do a basic static pressure test and record the results.

Even when things are busy, taking these few extra minutes often makes the difference between a mediocre year and a great one for many High-Performance HVAC companies.

FOLLOW-UP RIGHT AWAY OR DEFER?

Many salespeople are tempted to put off leads from service in favor of new customers calling for replacement quotes. In truth, service-generated leads more likely will result in higher priced work with little or no competition.

You can take better care of existing customers, plus you will win more profitable jobs instead of competing with all the low-bid companies out there.

When a system is performing poorly, and a replacement is warranted, be sure your salespeople follow up immediately. For example, when your salesperson finds statics so high that poor airflow will cause frozen coils and equipment failure.

DEFERABLE LEADS

When the equipment is fairly new and working OK, follow-up can be deferred to your slower season when you need work to keep your

team busy.

Think of it like a squirrel storing away acorns for the winter. Each lead is an acorn that you can choose to bring out as needed during your slow season. This will keep your company profitable and your team healthy and well-fed.

CREATE A FOLLOW-UP SYSTEM

The key to success with this approach is to create a system your service technicians and salespeople can easily follow. Your system should consistently provide guidelines on whether to defer a lead or follow-up right away. The system should also include a mechanism that triggers follow-ups so the leads are not lost or forgotten.

A great way to follow-up on these leads is to have someone in your office review your service tickets and rate the severity of the deficiencies found in testing. You can rate them from A through D, with A being the highest priority.

Keep these leads in a file and create a reminder in your CRM software to send a letter to your customer that shares your findings in plain language.

The letter should include several questions about health, comfort, and energy use. This helps your customer understand the connection between your findings and what they may be experiencing. Start with your A leads working through to your D leads as your slow season progresses.

NCI's "Important Test Results" system is designed to accomplish all of the above.

This approach has made a huge difference for many contractors in leveling their workload, while keeping good technicians and installers employed and busy during off seasons. It also maintains higher year-round profitability.

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Live & Online Training and Conference Discounts	✓	✓	✓
Member Rewards NCI Training Bucks on Purchases	15%	15%	5%
Training Incentive Partner Program (TIPP) Dollars	Maximum	Maximum	✓
NCI Online Store Discounts	✓	✓	✓
ComfortMaxx Air™ - Airflow Testing Software	✓	✓	✓
Unlimited Online University Courses	✓	✓	
Unlimited Webinar Access	✓	✓	
Bonus Annual NCI Training Bucks Earned	\$4200	\$1200	
ComfortMaxx Pulse™ - Air & Btu Testing Software	✓	✓	
ComfortMaxx Verify™ - Full System Testing Software	✓		
Print subscription to High-Performance HVAC Today Magazine	✓		
One Paid NCI Summit Conference Registration	✓		
Monthly Investment:	\$750	\$450	\$100

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Think you know airflow? Think you know carbon monoxide safety? Think you know how to solve your customer's comfort issues? Be sure. Don't guess. Find the training and expertise you need from the National Comfort Institute (NCI). Only at NCI will you find certification courses like Duct System Optimization and Combustion and Carbon Monoxide Safety, taught by leaders and innovators in the HVAC industry. Find out why NCI says, *"If You Don't Measure, You're Just Guessing!"™*

Visit the link below or call **800-633-7058** to find classes near you.

UPCOMING 2022 NCI TRAINING SCHEDULE

PUBLIC LIVE TRAINING

Residential HVAC System Performance and Air Balancing Certification Bundle

May 10-12: Centennial, CO (**SOLD OUT**)

Hydronic Testing, Adjusting, and Balancing

May 17-18: Sheffield Lake, OH

Commercial Air Balancing Certification Program

May 17-19: Livonia, MI

***SCE SPONSORED LIVE TRAINING**

Hydronic Testing, Adjusting, and Balancing

May 10-11: Los Alamitos, CA (**SOLD OUT**)

Commercial Air Balancing Certification Program

June 1-3: Los Alamitos, CA (**SOLD OUT**)

Refrigerant-Side Performance Certification Program

Jun 14-15: Los Alamitos, CA

Performance-Based Selling

Jun 28-30: Los Alamitos, CA

****TECH CLEAN CALIFORNIA TRAINING**

<http://ncilink.com/TECHCleanCA>

Refrigerant-Side Performance Certification Program

May 17-18: Sacramento, CA

May 17-18: Los Alamitos, CA

Residential HVAC System Performance and Electrification

Jun 14-16: Sacramento, CA

Jun 21-23: Los Alamitos, CA

Electrification Training

Jun 23: Los Alamitos, CA

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

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



Visit NCIlink.com/ClassSchedule to view the latest schedule of NCI Training events