

HIGH-PERFORMANCE HVAC TODAY™

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



The Art of Measuring Sales Performance

ALSO IN THIS ISSUE:

**System Temperature Testing:
Use the Right Instruments**

**The Training Investment:
Why Keep Employees Sharp?**

**ABCs of High-Performance
Contracting: Part 9**

Dwyer

WIRELESS HYDRONIC BALANCING KIT

Chiller Freeze Protection | Pump Pressure Drop | Refrigerant Pressure Monitoring



The Wireless Hydronic Balancing Kit was designed by your HVAC market leader to be the most accurate and easy to operate manometer on the market.

This balancing kit has two wireless transducers that measure the pressure drop across hydronic system valves and communicate to an Android™ handheld device via Bluetooth® wireless technology. The handheld's pre-loaded software allows users to read, record, and share data in the simplest way possible.

The wireless capability eliminates the need for cumbersome and unruly hoses. Its ergonomic design allows a single operator to monitor and balance a hydronic system in less time than traditional methods.

Unlike other hydronic manometers on the market, the 490W has built-in flow conversion capability, which shortens reporting time and eliminates human error during flow calculations.

The kit's overall efficiency, ergonomic design, and streamlined software make it the ideal solution for contractors looking to save time and money on a job.

SERIES 490W | REQUEST A QUOTE TODAY

800-872-9141 | dwyer-inst.com/M/490W



HIGH-PERFORMANCE HVAC TODAY™



MANAGEMENT:

ABCs of High-Performance Contracting, Part 9

Dominick Guarino continues his series with this discussion of the six steps of the High-Performance Sales process.



TECHNICAL:

System Temperature Testing: Use the Right Instruments

Is performance testing time consuming? It doesn't have to be. Casey Contreras shares some tips that can help.

DEPARTMENTS

Online Content.....	4
Today's Word.....	7
High-Performance News.....	8
High-Performance Products.....	11
Partner Spotlight: Jackson Systems LLC.....	12



SALES:

The Art of Measuring Sales Performance

Measuring sales is just as important as measuring airflow. Tom Piscitelli highlights how to do this and make sense of it.



TRAINING:

Why Performance-Based Contractors Invest in Training

This month we interview four successful Performance-Based Contractors who share their success stories.

Member Update	30
Photo of the Month	31
HVAC Smart Mart.....	32
Ad Index.....	33
One More Thing.....	34

FREE Monthly Download



This month's download is an instructional sheet on *Advanced Calibration Procedures for Fieldpiece SMAN 460 Refrigerant Gauges*. This one-pager is for use in the field by service technicians who measure refrigerant in residential systems.

The page details what is necessary to conduct the calibration, and provides a check-listed calibration procedure. Images depict the face of the instrument and highlight exactly which settings are needed and how to set them.

Go to ncilink.com/md0419, or use your phone with the QR Code below.

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



Online University

Critical Elements of Customer Service



Featured in this issue is the third module in our *Customer Service Training Series: Critical Elements of Customer Service*. Here you will learn about effective approaches to customer service as well as how your behavior affects the behavior of others. Also covered:

- Demonstrating confidence as a problem solver
- Dealing with difficult customers and situations
- Choosing to provide superior customer service.

This course is intended for your customer service reps, service providers, and customer service supervisors.

Go to ncilink.com/ou0419 to learn more.



BLOG POSTS

DO YOU KNOW YOUR HVAC FIELD TESTING ACCURACY?



There still exists some prejudice with regard to the accuracy HVAC field technicians can achieve when testing comfort systems in people's homes. Rob Falke examines how he sees that changing, what decisions are being made by engineers, designers, vendors, and suppliers based on those changes, and how you fit into this brave new world.

Read more at ncilink.com/FieldAccuracy.

MEASURE YOUR HVAC MARKETING MESSAGE



In the Performance-Based Contracting™ Industry, if you don't measure, you're just guessing. Well the same is true when it comes to marketing. In this blog post, Mike Weil explores how to measure this and why it's important.

Read more at ncilink.com/MktgMeasures.

Heard Around The Web ... THE ENTREPRENURIAL SPIRIT SHINES ON

National Comfort Institute (NCI) customer Jim Patterson is the owner of Orchard Valley Heating and Cooling in Southamptton, MA. His son, Brian, had an innovative product idea that led to their first manufactured product offering, the HVACIV®. That idea eventually evolved into a new business called JB Solutions.

The company now has two products that it recently launched:

- **HVACIV**, an automated biocide injection system for condensate drains
- **Humidicycle**® system, a device that recycles the water that is typically wasted during flow-through humidifier operation, conserving 16 ounces per minute.

Check out their web page at ncilink.com/JBS to learn more.



YOUR COMPLETE SUITE OF HVAC & IAQ EQUIPMENT

TSI is your one-stop-shop for ventilation and indoor air quality instrumentation. Simplify your equipment portfolio while working with the most accurate instruments available on the market today.

TSI offers a full line of:

- + Capture Hoods
- + Micromanometers
- + Hydronic Manometers
- + Velocity Meters
- + Thermal Anemometers
- + Indoor Air Quality Monitors

To learn more, visit tsi.com/comfort



Combustion and CO Safety Training

Learn how to improve customer's system performance, prevent carbon monoxide (CO) hazards, and increase profitability

Get the technical knowledge you need to prevent CO hazards, improve system performance and increase profitability with NCI Combustion Performance & Carbon Monoxide Safety training.

Prevention is the key to avoiding Carbon Monoxide hazards in the home. Each year thousands of people in the United States become ill or die from CO poisoning. Without full combustion performance & CO safety training, there is no way of knowing whether a system is safe or efficient.

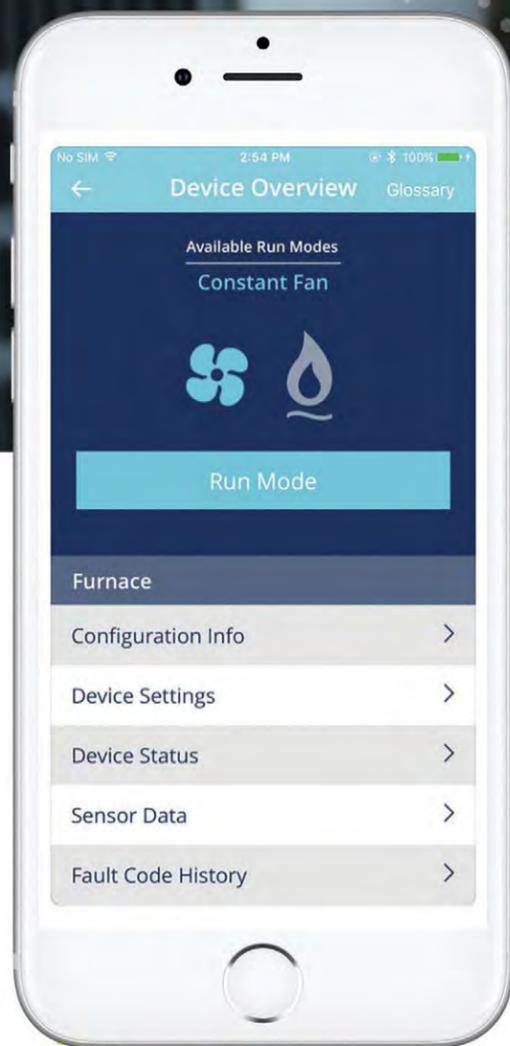
Not only will you be saving lives by becoming CO Certified, but you will be opening the door to new sales opportunities and greater profit.



Learn more and Register Today at ncilink.com/CO or call 800-633-7058

Thinking differently often creates a new technology that provides a better solution.

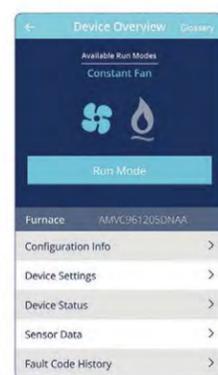
Connect. Configure. Diagnose.



Say goodbye to crawling, sweating, or waiting to initially diagnose select HVAC systems. Now smart contractors can wirelessly connect energy-efficient HVAC systems from a paired phone or tablet.



System Pairing Screen



Device Overview Screen

To download visit



CoolCloud™ app is engineered exclusively for high-efficiency Goodman® and Amana® brand heating and cooling systems.

www.coolcloudhvac.com

Our continuing commitment to quality products may mean a change in specifications without notice.

© 2019 Goodman Manufacturing Company, L.P. Houston, Texas · USA

TODAY'S WORD

By Mike Weil

Branding: The Key to Owning Your Customers and Your Marketplace

The battle for consumers' discretionary dollars is one that never ends. In this age of social media, digital content, and the glut of advertising, consumers are beset with what has become bothersome and noisy. They tend to tune out.

And that's where branding comes in. By the way, some people think branding means having the coolest logo or snappiest jingle. Truth be told, that IS important, but branding goes way beyond.

It is like a subliminal message consumers "hear" when they need help. Basically it's the brand that guides how customers perceive you. So, here are some key branding points worth considering:

- **Recognition.** People tend to do business with companies they are familiar with. Your brand is how you start to attract people to your company. This makes you stand out from the crowd, which is key in the HVAC universe because there is just so much competition
- **Business value.** A strong brand brings solid leverage when it comes to generating future business. It doesn't matter if the need is for borrowing money for expansion, or creating new products and services such as Air Upgrades, Duct Renovations, and Airflow Testing and Diagnostics
- **New customer generation.** Can you say, 'referral business?' People love to tell others about the brands they like. A strong brand provides a strong image or impression in the marketplace. This makes it easier for people to positively talk about and choose to do business with you, especially if you are recognized as THE expert in solving comfort and efficiency issues your competition doesn't even know about
- **Employee pride and satisfaction.** When employees work for strongly branded companies, they tend to be more satisfied with their jobs and have higher degrees of pride in the work they do.

What is stronger than being able to perform static pressure testing and solving longstanding issues customers may not realize they have?

● **Creates trust.** A brand that is consistent and clear puts customers at ease because they know exactly what to expect. It really represents your 'promise' to them. Performance-Based Contracting™ services is a promise that goes way beyond anything your competition can provide.

THE HIGH-PERFORMANCE HVAC BRAND

Think about the idea of measuring, testing, and diagnosing customers' comfort systems, combined with your reputation. Add in your ability for delivering what you promise -- and proving it. That is a brand that can shine brighter than all other brands combined.

Think about your maintenance agreements. Do you differentiate them from your competition's by going beyond a simple clean and check?

Every marketing pundit and consultant will tell you that your brand is key to dominating your marketplace and owning your success.

It's not easy. Nothing worth doing ever is. It is an investment in training, practice, and time. It's cultural. But the benefits are simply awesome!

In this issue, read the article on why Performance-Based Contractors **invest in training** (page 27) which contributes to their brand. From a sales standpoint, Tom Piscitelli discusses **principles of measurement in sales** (page 20), and Dominick Guarino goes further into the **ABCs of High-Performance Contracting** with a step-by-step approach to sales (page 16).

These are just some things successful contractors do to assure they outshine the competition in their marketplace. So what are you doing to build your brand? 



Mike Weil is editor-in-chief and director of communications and publications at National Comfort Institute, Inc. He can be reached at mikew@ncihvac.com

Events and Announcements: The HVAC Industry Never Sleeps

NCI Partner EGIA Announces EPIC2019

EGIA recently announced the dates for its annual meeting for HVAC contractors: EPIC2019. The event is scheduled for October 3-4 at the Bellagio in Las Vegas, NV.



EPIC is an acronym for "Educating Professionals in Contracting," and has been hosted by EGIA for many years.

EPIC2019 has a whole host of highly recognized speakers presenting best-practice seminars on marketing, sales, recruitment, leadership, and management. Speakers include:

- **Opening Keynote Max Major** – world-renowned mentalist and mind reader
- **Closing Keynote Jay Leno** – legendary comedian and television host
- **Weldon Long** – author and HVAC business consultant
- **Drew Cameron** – president, HVAC Solutions and Energy Design System, Inc.
- **Gary Elekes** – president, EPC Training
- **Steve Shallenberger** – author and president, Becoming Your Best

Global Leadership LLC

- **Mark Matteson** – author of *Freedom from Fear* and *A Simple Choice*
- **Brigham Dickenson** – president and founder, Power Selling Pros.

According to the EGIA announcement, "EPIC2019 is designed not only to reinvigorate and entertain contractors, but also for attendees to walk away with the tools, resources, and knowledge they need to take their businesses to the next level of success. All contractors are welcome, and free registrations are available to NCI-EGIA members (hphvac.net) at most levels.

So mark your calendars today.

For more information, go to ncilink.com/EPIC2019.

Munch's Supply Buys Comfort Air Distributing

New Lenox, IL-based Munch's Supply recently announced they acquired Comfort Air Distributing and its three Colorado branches. This expands the HVAC distributor's geographic footprint to 27 locations in nine states.

Munch's, which was founded in 1956, is a member of HARDI (Heating, Airconditioning, and Refrigeration Distributors International) and a supporter of NATE



(North American Technician Excellence).

In a recent announcement, company CEO Robert Munch says this acquisition is part of Munch's long-term strategy to expand into other regions through strategic acquisitions.

The company will continue to operate under the Comfort Air Distributing name, offering Rheem Heating and Air Conditioning equipment. In addition, Comfort Air will continue to serve 13 Colorado and Wyoming counties via branches in Denver, Centennial, and Colorado Springs, CO.

Learn more about Munch's at ncilink.com/AboutMunchs. Learn more about Comfort Air Distributing at ncilink.com/ComfortAirDist.

Contractor Star Power Shines At ACCA Event

The Air Conditioning Contractors of America (ACCA) honored several HVAC contractors during their Annual Conference and Expo at the Gaylord National Harbor in Washington, D.C., February 12-14.

Phil Forner of Allendale Heating Co., Allendale, MI, received the organization's highest honor: their *Spirit of Independence Award*.

This award is presented to an individual who makes significant and lasting contributions to the strength, success, and independence of HVACR contractors. It recognizes one individual who goes above and beyond the call of duty, displaying creativity, ingenuity, and perseverance in their pursuit of a better industry.



Phil Forner receives ACCA's highest honor: The Spirit of Independence Award.

Among his contributions:

- **Served on ACCA's Board of Directors**, eventually becoming chairman in 2007
- **Active on several committees** and served as chairman of the Technical Service and Codes Committees as

well as on the Standards Task Force

- **Led ANSI recognition efforts** for recognizing ACCA as a standards development organization
- **Driving force behind ACCA's involvement in the International Code Council** and International Association of Plumbing and Mechanical Officials
- **Active in Government Relations** activities
- **A strong proponent of encouraging young people** to join the HVAC industry.

"ACCA is proud to honor Phil Forner with the Spirit of Independence Award, ACCA's highest honor," said Barton James, ACCA president and CEO.

"He has made significant contributions that will have a lasting impact on profes-

sionalism in the industry. Phil is certainly dedicated and passionate about our industry, and he joins a select group of others who have received ACCA's most treasured award."

The second star recognized during the ACCA event is **John Sedine of Engineered Heating & Cooling** in Cedar Springs, MI. John received the *Distinguished Service Award*.

In a press statement, ACCA said, "Each year, ACCA recognizes one volunteer who has demonstrated an extraordinary commitment to ACCA and the contracting industry with the Distinguished Service Award.

"Sedine has been a devoted leader in the industry and ACCA for more than 25 years. He served as Chairman of the ACCA Board of Directors in 2010, served

MANAGE ALL YOUR REVIEWS FROM ALL MAJOR REVIEW SITES, IN ONE EASY LOCATION

Reviews are an important part of your company's reputation.

We created RevuKangaroo to help your company manage online reputation, enhance employee relations with customers, and address customer concerns before they are posted on review sites. All of this can be tracked from one easy to use website.

RevuKangaroo
Take control of your online reputation.

Get Started Now!
revukangaroo.com

Find out what people are saying about your business and employees



John Sedine receives ACCA's Distinguished Service Award.

on the Board of the Michigan contracting association, and has served on several state and national code councils.

"He has contributed to the success of ACCA's standards and codes programs by lending his expertise to the development of multiple ACCA initiatives, including the Quality Installation program, ACCA Manual LLH – Low Load Homes, and countless other efforts."

ASHRAE Accepting Applications for HVAC Designer Certification

The American Society of Heating, Refrigerating, and Air-Conditioning Engineers (ASHRAE) announced a few weeks ago that applications for the new Certified HVAC Designer (CHD) certification are now open. Worldwide computer-based testing opens on June 3, 2019.

From the ASHRAE perspective, this certification validates competency of the HVAC Designer, working under the responsible charge of an engineer, to do the following:

Design HVAC systems to meet building/project requirements, including load calculations, equipment selection and sizing, mechanical equipment room

design, duct and piping design, and layout for the development of HVAC plans for permit and construction.

The exam follows a 2018 industrywide job analysis study with data that was gathered from more than 1,200 respondents from over 60 countries. The CHD application is currently open with a practice exam launching May 1.

"The certification committee suspected an HVAC Designer certification would serve the needs of members, but the 'Industry Needs' survey data emphasized a need and demand," said Mark Fly, P.E., chair of the exam subcommittee.

You can learn more and apply at the following website: ncilink.com/CHD. You can also download the CHD Candidate Guidebook here: ncilink.com/CHDGuide.

Focus On Sales

YOUR FAMILY'S COMFORT CONSUMER SALES BROCHURE

This brochure was designed to be used as a roadmap for your residential customer to follow along with you on the sales call.

The ideal time to bring this out is during the initial interview, as it helps guide you through the interview process



and gets the customer thinking about their real needs.

This process positions you in a very professional manner and

initiates the type of customer education that is key to Performance-Based Selling.

These brochures highlight the four steps a Performance-Based Contracting™ business takes to develop the best solutions to customer comfort issues:

- Conversation About Customer Needs
- The Process for Measuring the Home
- What is System performance?
- Rating System Efficiency
- Review Recommendations
- Doing the Work and Performance Measurements.

For more information on these brochures and how to order them, contact National Comfort Institute, Inc. Customer care at 800-633-7058.

FIELDPIECE SDMN5 DUAL PORT MANOMETER

Do your salespeople show homeowners what their before and after static pressure reading are and explain what they mean in terms of their system effi-

ciently delivering comfort? They should. And the Fieldpiece SDMN5 is perfect for doing just that.

This instrument is a portable, rugged, dual-port manometer designed especially for use in the field. It measures static pressure, as well as gas pressure and pressure differential. It includes a zero adjust button on the face of the meter, a rugged rubber boot, and a magnet on the back for hanging the meter during testing.

The SDMN5 evolved as a result of testing pressures in the field for 20 years.

Its range and resolution allow you to take static pressure measurements



across a blower and get the pressure differential with the push of a button to check drafts.

Whether you're holding the ergonomic standalone shape in your hand, or hanging the SDMN5 on the unit with the magnetic hanger to fill out a work order, the SDMN5 makes field measurements easier and faster, with less fatigue than the other guys.

For more information, visit the NCI Product store at NCILink.com/SDMN5 or call Customer Care at 800-633-7058.

PRIORITY CARDS

An NCI-exclusive, these handy cards are an efficient way to learn about your customers' comfort concerns. Use these while having a conversation with a cur-

rent or potential customer.

These bright and easy-to-understand cards will help you target key issues quickly. The issues are Comfort, Efficiency, Health, and Safety.

Each packet includes four priority cards and access to PDF instructions for how to use them.

Go to ncilink.com/PriorityCds for more information or to order.



THE NEW FLAT RATE

This All-In-One pricing software is for HVAC, Plumbing, and Electrical service and installation contractors. Each trade contains over 300 menus to choose from, saving you time in the field.

It has pre-built menus, allowing customers to choose from options. In fact, you can offer five price options on every service call.

Track key performance indicators by



tech, by customer, and produce daily tickets as well as weekly options reports. Works with most service and dispatch programs.

For more information or a demonstration, visit theNewFlatRate.com website or call 706-259-8892.

Job Link System

Easy, Long Range, Powerful

- 350' Wireless Range**
 - Strong signal goes through walk-ins
- JL3 Psychrometers**
 - Flexible wand with heavy duty magnet
- JL3 Pipe Clamps**
 - Extremely accurate and fast reacting
- JL3 Pressures**
 - Fits in tight spaces with 45° angled fitting

714-634-1844
www.fieldpiece.com

TO YOUR Success

CUSTOMER FOLLOW-UP MADE EASY

Now fully automated with ServiceTitan

View a demo • ToYourSuccess.com

Jackson Systems, LLC: Making Evolutionary Changes

“LIFE IS A SERIES OF NATURAL AND SPONTANEOUS CHANGES. DON'T RESIST THEM; THAT ONLY CREATES SORROW. LET REALITY BE REALITY. LET THINGS FLOW NATURALLY FORWARD IN WHATEVER WAY THEY LIKE.”

— LAO TZU

Two years ago, before the launch of **High-Performance HVAC Today** magazine (ncilink.com/HToday), I wrote a spotlight article on Jackson Systems, LLC – an HVAC zoning-system manufacturer based in Indianapolis, IN for the NCI member-only newsletter (If you are a member, log into the site: ncilink.com/2017JacksonSys).

In that article, I highlighted how the HVAC Industry itself was running through the veins of Ron Jackson, founder of the company and, by virtue of being his son and growing up in the business, through Tom Jackson's as well.

Back in the earliest days, the company focused on developing contractor-friendly zoning controls that were easy to install, troubleshoot, and repair, and they sold them mostly in Indiana and the Midwest.

Great stuff, but as the saying goes, change is inevitable. Zoning controls led to a thermostat private labeling program, which also led to the company's representing other major thermostat manufacturers, including Honeywell, Aprilaire, White Rodgers, Ecobee, and Nest.

**JACKSON
SYSTEMS**
Controls Done Right™

And so, Jackson Systems began the evolution into product distribution.

THE EVOLUTION CONTINUES

For a manufacturer to get into the distribution business is always a slippery slope. Jackson Systems CEO Tom Jackson says they wanted to avoid confusion and decided to set the distribution business up as a separate entity.

“We don't claim to manufacture products like we once did,” he explains. Jackson, a degreed engineer who spent several years as a territory manager with a large wholesaler in Indiana before partnering with his father in 1997, says, “We started another entity called ‘**iO HVAC Controls**.’ That entity is the manufacturer now. Jackson Systems is the distribution company and we buy our zoning products from iO HVAC Controls.” Talk about evolution.



Jackson says he decided to follow the traditional market approach where HVAC contractors buy products from a distributor.

“When we were just a manufacturer everyone said ‘Jackson sells direct,’ and that was true. But now that we have separate manufacturing and distributing entities, our zoning products go out through normal channels.”

He adds that Jackson Systems is pretty agnostic when it comes to zoning. “Yes, we can provide you the iO HVAC Controls products,

but we can also provide you Honeywell or Aprilaire or whoever else you want. We are a specialty distributor that focuses on controls, indoor air quality, and the smart home marketplace. This is a pretty big change in how we go to market.”

Like any other HVAC manufacturer, iO HVAC Controls has its own sales team. Jackson says they call on wholesalers to carry the iO product line. But they also call on contractors to get the pull through business.

“On the other hand,” he says, “Jackson is a traditional distribution outlet.

We buy the products from other manufacturers, warehouse those products in Indianapolis, for now, and then ship them out to contractor customers on the same day.”

To accommodate all the inventory they now carry, Jackson Systems has

doubled the size of their headquarters building and has another warehouse down the street. That location is mostly for the company's **Filter Fetch** program.

Filter Fetch is a web-based app that enables contractors to sell filters without having to physically inventory them. Filters are then delivered directly to the homeowner from the Indianapolis warehouse. This is Jackson Systems' answer to competition from big-box retail outlets like Lowe's and Home Depot.

FOCUS ON TRAINING

As a distributor, there is increased opportunity for Jackson Systems to get involved in helping their contractor customers get better at delivering



high-quality service and installations. Tom Jackson has always been a huge believer in training.

He says, “Today we deliver it differently because we are a single-location distributor. We will bring other manufacturers to our facility in Indianapolis. We'll then invite local contractors to attend. We provide food and hands-on interactivity with the presenters.

“But then we live-stream the training so others can watch it in real time. We stream it all over the web using our own commercial studio that is right in our building. Finally, we record the training so it can be watched on demand.

“Our complete training schedule is on our website,” he continues. “We try to make sure our training is NATE cer-



Company CEO Tom Jackson (left) is pictured here with his mother Bette, and father (and founder) Ron.

tified so that if a contractor needs CEU credits, they can go online, watch the videos, and take a test that NATE requires to verify that it happened.”

Training is a serious part of the services Jackson Systems provides, though according to Tom Jackson, they do approach it a little differently by delivering most of the content via the web.

“This approach works for us and our customers,” he adds. “And I think it ties in nicely with our support of the technical training provided by National Comfort Institute (NCI). What NCI is doing with their training is just outstanding.”

THE NCI CONNECTION

In a world that always undergoes change – sometimes economically or politically, training is key, according to Jackson, to staying on top of the best ways to solve customer comfort issues and make it easier to stand out from the competition.

Tom Jackson will tell you that since its beginnings, his company has had a strong focus on the HVAC contracting community. He says they like being partners with groups that work hard to promote the HVAC industry and who focus on the technical side.

“In that light, what NCI does is truly incredible,” Jackson continues. “NCI's technical expertise has always been

of interest to us. I really admire how that organization is leading the way by looking at HVAC systems as more than just equipment. I also think the entire concept behind measuring and diagnosing is the key to this industry's future.”

He explains that his company has been interested in NCI almost from the beginning. In fact, Jackson says understanding static pressure and temperature, and having the right tools to measure and manage airflow through duct systems, is just so powerful when it comes to creating a comfortable customer.

“And I feel that we are all working toward that same goal,” he adds.

Which is why Jackson Systems became a vendor partner with NCI. And with NCI's move away from a traditional rebate program and to the Training Incentive Partnership Program (TIPP), he feels even more strongly about the connection.

“With our renewed focus on training, I cannot think of a better use of the partner program than to see a percent of our sales go to helping our customers pay towards their training,” he says.

“This helps to make them stronger contractors. Which in turn, contributes to building a great reputation in their community. This leads them to earn more business, which in turn means more business for us. It is a cycle of

life thing. The investment in what NCI is doing is absolutely the right thing to do. We couldn't be happier."

NEW INTRODUCTIONS

On the manufacturing side of the business, iO HVAC Controls is in development mode and will be introducing new products to the marketplace. It has been working on a new four-zone panel design that has the ability to eliminate the bypass damper, which is one of the biggest issues when doing zoning. Jackson says they've seen success with what they call Electronic Static Pressure (ESP). This is what replaces the bypass damper.

Furthermore, the company is hoping to roll out its own WiFi thermostat as well as a new 'retro-damper' that

will fit directly into the boot – which he says is a dramatic departure from how other systems are installed.

By the way, Tom's father, Ron, is still active in the business. He recently celebrated his 80th birthday and is still involved in product development and technical support. He is also involved in the new construction projects the company is doing around the building.

On the distribution side, Tom says they are making huge efforts to integrate smart home technology into the

HVAC contracting business.

"I'm talking about not only connected thermostats," Jackson says, "which most people are pretty comfortable with, but also things like indoor air quality monitors, whole house water valves, cameras, doorbells, and alarm systems. Right now we are buying and selling a lot of these products.

"For example, Honeywell has a line of security cameras. Nest has a line as well. We became the first HVAC distributor for Ring – the video doorbell



ZP3-HCMS-ESP Group with PS and Dampers.

now owned by Amazon. We are on a mission to find even more products," he says.

So stand by, HVAC World! Jackson Systems may soon be offering connective wall switches to integrate everything throughout a home. This will create a smart home infrastructure allowing consumers to control it all from their smartphones. And he says they are on the hunt for much more.

"We know that HVAC contractors have lots on their plates. It is already a difficult profession to be in because it requires so much knowledge, but we think there is some nice incremental business to be had with some decent margins, especially since the contractors are already in the home. Why not ask if their customer wants camer-

as or a doorbell with their mechanical system and/or duct upgrade."

DEFINING SUCCESS

For Tom Jackson, feedback from customers is how he knows if they are doing their job, and that is how he defines success. "If I am at a trade show and a contractor tells me how much they appreciate how awesome we are at answering the phone, getting the product shipped out, and that we have the technical expertise they need, that is a huge win.

"I believe in serving others so they, in turn, can serve others. Then it is a double win. That is how I measure success."

In the end, he says that business success is really dependent on a ser-

vant attitude, helping others first. Part of the method for doing that is to first seek help for yourself, and you do that, according to Jackson, by joining a group of like-minded professionals.

"Whether that group is NCI, ACCA, or any other contractor-focused organization, there just is too much to gain and nothing to lose."

Albert Einstein once said, "The world as we have created it is a process of our thinking. It cannot be changed without changing our thinking."

It is because of how **Jackson Systems** and **iO HVAC Controls** approaches the marketplace and focuses on servant leadership that we shine our **April Partner Spotlight** on them.

Congratulations to Tom and the entire team! 



R.E. MICHEL COMPANY

WHOLESALE DISTRIBUTORS • AIR CONDITIONING • HEATING • REFRIGERATION
PROPANE • EQUIPMENT • PARTS • SUPPLIES

A Family Business Since 1935 • Customers First... Coast to Coast



INVENTORY SOLUTIONS TO FIT YOUR BUSINESS

Contact your local branch
or email sales@remichel.com

remichel.com



**BORN IN THE TRADES
BUILT FOR THE TRADES**

The #1 Software for Home Services



www.servicetitan.com

YOUR COMPLETE SUITE OF
HVAC & IAQ EQUIPMENT

TSI is your one-stop-shop for ventilation and indoor air quality instrumentation. Simplify your equipment portfolio while working with the most accurate instruments available on the market today.

TSI offers a full line of:

- + Capture Hoods
- + Micromanometers
- + Hydronic Manometers
- + Velocity Meters
- + Thermal Anemometers
- + Indoor Air Quality Monitors



To learn more, visit tsi.com/comfort



Six Steps of High-Performance Selling

In part eight of this series we examined the importance of customizing your sales call based on how the lead was generated. Now let's take a look at each of the six basic steps of the High-Performance sales process, keeping in mind how the lead was generated. We'll also compare High-Performance selling to the typical selling process in our industry.

STEP 1: CUSTOMER INTERVIEW

This step is a lot like what happens on a quality sales call. It involves establishing rapport with your customer and learning about their expectations and needs. But that's where the similarities to a typical sales call stop.

The Performance-Based interview delves deeper into getting a real picture of what customers like and don't like about their comfort system. It involves you asking probing questions to help uncover often forgotten comfort issues they've just learned to live with.

Questions should be as open-ended as possible. For example, instead of asking which rooms are too hot or too cold, be specific. Better questions could be, "Which room is the hottest on a summer afternoon?," or "Which room is the coldest

on a February morning?"

Customers often hear from their HVAC contractors that nothing can be done, so they just learn to ignore problems like uneven temperatures, high utility bills, noisy systems, drafts, dusty or stuffy rooms.

Our job is to uncover these issues and explain that we now have the knowledge and tools to diagnose and solve them. It's usually a good idea to focus on the one or two most critical concerns rather than overwhelm customers with too much.

A high quality comfort survey can help keep the



interview on track and hone in on the customer's hot buttons. Remember, if they have no "pain" associated with their comfort system, it's hard to make a case for improvements.

Your goal is to uncover that pain and offer ways to alleviate it. The interview also draws attention away from the "box" to further differentiate you from your competition.

STEP 2: EVALUATE THE SYSTEM

This step is critical in the educational selling approach. Whenever possible, be sure to involve your customer as you move through the house evaluating their system. For example, if you are measuring airflow at registers in an uncomfortable room, hand the customer the flow hood and



ask them to help take readings while you write them down.

This level of involvement is part of the process of getting them hooked on your company as the best choice.

It's important to measure key static pressures, even if they were already measured by your technician when the lead was generated from a service or maintenance call.

This gives you the opportunity to explain how these readings are the "blood pressure" of their system. If the system is in the attic or crawl, it might be best to take pictures with your smart phone so you can share visuals of the readings as well as ductwork and insulation issues.

Depending on the situation, other steps in the process can include more

air flow measurements, taking room temperature readings, checking insulation with an infrared thermometer, and performing a simple snapshot System Efficiency Rating. Performing this test will depend on whether you're checking in cooling or heating mode, and whether the current equipment is still working.

STEP 3: REVIEW AND PRIORITIZE FINDINGS BASED ON THEIR NEEDS

One of the benefits of measuring live system performance is you can immediately share your findings with your customer to help them understand what's going on with their system.

This step reinforces how your company is different from competitors who just quote high efficiency equipment

swap outs and don't address existing problems. This is a good time to explain how a high SEER box doesn't guarantee energy savings or comfort. In fact, the customer may see no savings at all and be less comfortable if they don't address the "rest of the system."

At this point you can offer to put together some different options that address the issues that are important to them. When done properly, this step will be a key factor in the customer's decision to give you the job.

Be careful not to leave behind too much detail about your solution. Some people can't resist the temptation to "shop" your findings and solutions out to other contractors. What you should leave them with is a solid education about their system and what's working well and what is not.

If they are getting multiple quotes, the customer will likely know more about the system than your competition. The danger of leaving your test data and detailed solution is a competitor may know enough to make it look like he'll do the same things you recommended.

This is a good time to explain to the customer that not giving the compe-



Catch up on all the installments of this series:

Part 1: What is High-Performance HVAC and Why Do It? ncilink.com/ABCs-1

Part 2: Is It the Right Fit for Your Company? ncilink.com/ABCs-2

Part 3: Five Steps for Becoming A Performance-Based Contractor. ncilink.com/ABCs-3

Part 4: Five More Steps to Becoming a Performance-Based Contractor. ncilink.com/ABCs-4

Part 5: Your Investment in Performance. ncilink.com/ABCs-5

Part 6: The Five Keys to Quality Training. ncilink.com/ABCs-6

Part 7: The Right Tools for the Job. ncilink.com/ABCs-7

Part 8: High-Performance Selling: Prepare for the Call. ncilink.com/ABCs-8

tition your information is a great way for them to evaluate that company's competence. What other criteria do they have to do this with – Price? They said they do great work. Who's going to tell a customer they do lousy work?

STEP 4: PREPARE THE PROPOSAL

There are basically two schools of thought about sales calls in our industry. One camp believes that everything should be done in one visit. This is typically done with a check-the-box proposal form.

or tie the customer up for an extra hour while you work on their solutions.

I personally have had great success with both the one-call and two-call sales processes. On a one-call proposal, it's important to leave yourself a little room for things you may have missed. When it comes to a two-call proposal, if you've done a thorough job teaching the customer on the first call and completely differentiated yourself, the customer is usually willing to wait for your proposal.

If the air conditioning is down and

ant orange X on them, and temporarily install one to get the cooling back on so your prospect doesn't jump on the first competitor who can schedule an equipment swap out right away.

The garish paint job motivates the customer to make a decision because they'll want to get the unit out of their yard as soon as possible. Showing you care enough to get them running again without expecting anything will endear you to a customer in a very significant way.

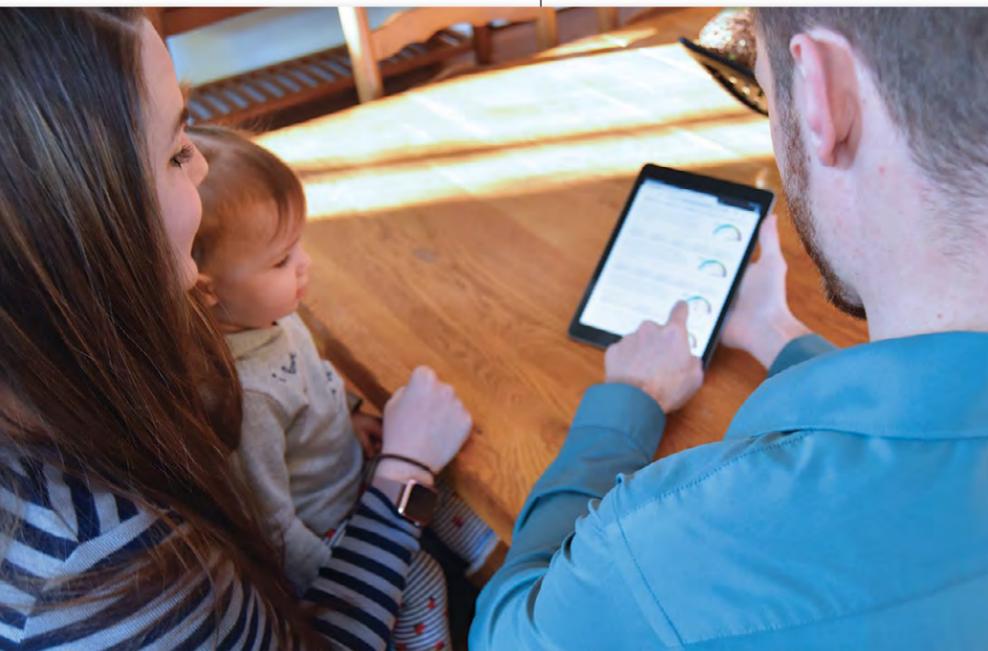
As you prepare the proposal, be sure to address what is most important to the customer, not just what you think they need. There are some exceptions to this. For example if the home has a unit that is already grossly oversized and the customer wants an even bigger one, you'll need to make an ethical decision to not give in, but rather do your best to educate them about all the dangers of over-sizing. In extreme cases you may decide to walk away rather than do a job that will come back to bite you, or that you know is absolutely the wrong thing to do.

The beauty of the educational buying process is you have the opportunity to make the customer a lot smarter about their system. They'll often know more about their system than your competitors are capable of finding out. What a great position to be in!

It's always best to offer at least three options – four is even better. more than four can be overwhelming. In Performance-Based Selling the "Best, Better, Good," approach takes on a whole new meaning. It's not just about which equipment to buy, but the various levels of system improvements you can include, coupled with the benefits of each option.

it's 100F outside, you may want to quote a solution in steps. You can, for example, offer a basic "Air Upgrade" to make sure the new equipment operates within the manufacturer specifications, along with additional upgrades that can be done in milder weather.

If the customer needs emergency cooling while you work on a more comprehensive solution, keep some old working condensing units at the shop. Paint them bright orange or paint a gi-



The second camp believes that once you've collected all the information it's important to go back to the office, think through and customize the solutions, and present a formal proposal on a second visit.

I've seen both approaches work well, so it's difficult to recommend one over the other. In a home with serious air distribution issues, further evaluation and design might be necessary. In these cases it's not a good idea to rush it



customer really wants it. These are ok for the rare customers who already have the money in hand, but like the idea of a 12-month interest free loan.

Unfortunately most customers don't have this luxury. If they can't afford the big cash outlay today, it's likely in 12 months they will be in the same boat, and are forced into a high interest refinance to make ends meet.

Once the customer has decided which options to go with, it's time to explain the process of what will happen next. You can go over next steps, how long it will take, what provisions need to be made for security, pets, children, etc.

This is also a good time to talk about the perhaps small, but significant details that are important to the customer. These details include thermostat placement, new registers, condensing unit placement (if these are being moved or added) and so forth.

STEP 6: FOLLOW THROUGH

The typical installation will include new equipment, a duct renovation, added returns, etc. Once the work is completed, tested out, and documented, be sure to go back for a final visit. This visit allows you to answer questions, teach them about their new sys-

tem, and inspect to make sure the job was done as promised.

Make sure you provide documentation of the final test results. This is the final proof that you did what you said you were going to do.

You can generate great referrals during this final visit. Once you've asked if they feel you've done everything you promised, and they let you know you exceeded their expectations, it's time to ask for referrals.

Even if their friends and relatives don't need a replacement system right away, ask if they would be willing to refer your company for service and maintenance. These are terrific leads that can lead to replacement and renovation work down the road.

These folks will likely spend time in your customer's house and experience the comfort your new system is providing. The bottom line is if you ask for a referral, there's a good chance you'll get some.

Remember that High-Performance selling is a mindset and part of a company culture. While it's important to help your customers buy efficient replacement equipment that can give them peace of mind, it's equally important to address the whole HVAC system so it matches the quality of the equipment you are installing.

In Part 10 of this series we'll look at ways to generate leads from service and maintenance visits with little or no competition. 



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



The Art of Measuring Sales Performance

NCI'S WELL-KNOWN TAGLINE, **IF YOU DON'T MEASURE, YOU'RE JUST GUESSING!**[™] HAS RECEIVED THE ATTENTION IT DESERVES, SERVING TO BOTH INSTRUCT AND DEMAND A HIGHER LEVEL OF PROFESSIONALISM ON THE TECHNICAL SIDE OF THE HVAC INDUSTRY. THE ART AND SCIENCE OF MEASURING ALSO APPLIES TO YOUR COMFORT ADVISORS' SALES PERFORMANCE. HERE'S HOW.

Have you ever thought about "measurement?" I can't think of anything that isn't measured. How often do we ask ourselves questions that begin with, "how many," "how much," "how long," or "how far?" Measuring is natural and it's done for some very good reasons. Let's look at measuring as it applies to sales performance and what the benefits could be to you and your company.

WHY MEASURE SALES PERFORMANCE?

Every thing and every person in your company has a purpose that ultimately should produce a profit. There are optimal ways to perform every task and your day is consumed with correcting things that aren't going in the right direction. As long as sales are coming in you don't worry

about the number of leads, or their cost, or the job selling price. Among other things, your immediate focus is on ordering materials, staging the job, getting it installed, and collecting the money.

Wait! Your purpose is to make a profit, right? Doesn't the cost of the lead, the sales close rate, average job selling price, number of estimated labor hours, material costs, and other factors contribute to the amount of profit you produce? And won't improving all of these have a positive impact on your bottom line?

Absolutely.

So, measuring these sales-related variables will help you determine where you are doing well and where you are not, so you can take the necessary steps to maximize profitability.

WHAT TO MEASURE?

Here are seven key measurements that are essential: each is compared to its goal or target. Also, each measurement delivers a management message worth listening to.

1. Annual sales: \$1.5 million for a full-time comfort advisor. Annual sales should be broken down to monthly and weekly targets, based on historical data

2. First call close rate: 15-25% is what you should expect, depending on selling skills, lead sources, and customer urgency

3. Follow-up close rate: Should be between 20-30%. This depends on how well the agreement was between the sales person and customer for follow up, how effectively your salesperson adapted to the customer's buying style, and how appropriately persistent the salesperson was

4. Average job selling price: This depends on your market area, but on average you should expect between \$12-15,000 for a complete system replacement, including ductwork upgrades. Replacing the entire duct system can add even more -- between \$6-8,000

5. Revenue per lead: \$5-6,000 depending on the average job selling price and close rate

6. Gross profit margin: 55% is re-

quired to pay a sales commission, cover marketing, other overhead expenses, and produce a 10-15% net profit

7. Gross profit per man day: \$2,000 or more. Determine the monthly overhead cost plus desired monthly net profit. Then divide that by the total net man-days of labor available to create the target. The secret to success is in selling the value of higher-end solutions, not just tight labor and materials cost management.

COMPARE RESULTS ... TAKE ACTION

It's easy to set these targets. It's another thing to set up a tracking system to record and analyze the data. Many of today's business management software providers, such as

ServiceTitan, FieldEdge, or TRUST PRO, come ready-built to record leads and track sales results.

If such software is not available, you can create a spreadsheet and your sales coordinator can manually enter the data and create the reports. Regardless, reviewing the data as often as daily will give you the information you need to immediately recognize when things are going well, and when you need to take corrective action.



THE NEW FLAT RATE

"Thanks to The New Flat Rate our average service trucks are now bringing in over half a million a year each!"

Dan Peterson - Owner
Del Rio Comfort Tech
Del Rio, TX

706.259.8892
www.thenewflatrate.com

Eliminate the need for Bypass Dampers!

It's as simple as...

1 Static pressure sensor with probe

2 Zone control panel with built-in electronic static pressure control

3 High quality zone dampers

BELIMO

ESP zone panels eliminate the need for bypass dampers by using built-in Electronic Static Pressure control.

JACKSON SYSTEMS
Controls Done Right[™]

888.652.9663
www.jacksonsystems.com

NCI
National Comfort Associates, Inc.
PREFERRED PARTNER

For example, it's January and your revenue-per-lead is plummeting. Your sales report shows that your close rate dropped 10 points and your average job declined by more than \$1,500. This is alarming and is worthy of immediate attention. So you call a sales meeting and your comfort advisors point their fingers at the lead sources, all coming from online bid services. Or they blame price-shopper customers, the relatively mild weather, the economy, and lead-setters who schedule all 'single-leggers.' Sound familiar?

TYPES OF ACTION

It's true that your technician leads have all but dried up by now, and it's true that internet bid sources tend to attract price-shoppers, and the weather is mild, the economy is sketchy, and getting both "decision-makers" to commit to a two-hour sales call is tough at any time. It's January, and this has happened before. It will happen again.

The first problem to solve is the **comfort advisors' attitudes**. They have bought in to all of these "excuses" for not closing sales. They need some timely resources and encouragement to help make sales. This will turn their attitudes around.

The lower close rate indicates a **lack of urgency** among customers. At this time of year, it's common for homeowners to choose to repair vs. replace. The lower average job selling price indicates your comfort advisors **dropping prices or selling the lower end**, a reactionary decision when they believe homeowners are looking for lower prices.

When sales are slow, retail businesses promote *Zero Percent, 60-Months* financing to overcome objections about waiting. When tech leads slow down, you can review Repair Vs. Replace strategies with your technicians, and maybe double their spiff for 30 days on all sales leads that sell.

With your service department being

all caught up, this is the perfect time to send out a direct-mail post card offering a Precision Tune-Up Special.

Or my favorite, if you have been following NCI guidelines, this is the perfect time to send a letter to your service and maintenance customers with equipment more than 10 years old and high static pressure readings.

MEASURING FINDS IMPROVEMENT OPPORTUNITIES

Often your measurements are on track, but you know you can do better. Let's say your sales results are right on plan and you're headed toward a successful year.

If you have several comfort advisors, you can compare their individual results. If their revenue-per-sale results are similar, but one has a higher close-rate accompanied with a lower average job price, then there could be an opportunity with that comfort advisor to change her proposal strategy and produce higher sales.

It's not uncommon for comfort advisors to fall into mindset patterns, believing they have figured out the sweet spot where a certain product mix at a certain price will sell more effectively.

This cannot be true as all customers and all homes are unique, but the comfort advisor has convinced herself it's true, nonetheless.

You can discuss this with her and encourage (require) her to get back to offering a "best" full-system approach, using the discovery and measurement techniques she has been trained to do. She can then show the customer the benefits of solving

fundamental design and installation problems uncovered. Getting your comfort advisor back on track will prove to her that she's making an assumption that's not valid and producing less as a result.

MEASURE FOR FUN AND REWARD

What I do for a living isn't work... it's fun. It's fun because I enjoy helping motivated people create improved results. I love it that my training graduates routinely sell jobs for \$12-\$15,000 or more, that over 20% of my newsletter articles are opened and read, and that over 90% of those attending my speaking events find the content highly-valuable.

Measuring provides feedback that can stimulate the need for change, and

it can also provide recognition and be the basis for reward.

People appreciate and value being sincerely recognized. Money as a reward mechanism is a distant second to recognition. Measure and post your sales results and you will find your top performers will work hard to stay there, and others will work even harder to measure up with the best.

SIX-STEP PERFORMANCE MEASURING ACTION PLAN

- Establish appropriate performance measurements and goals
- Assign someone to keep the results up to date
- Post publicly
- Reward outstanding performance
- Privately coach for improved per-

formance when needed

- Commit to leading and managing your business intentionally, establishing goals, defining expectations, and create a culture where your team members are expected to create outstanding results.

Create a fabulous 2019, no matter what the weather and economy have in store for you! 



Tom Piscitelli has over 40 years' experience in HVAC sales, sales management, marketing and consulting. His articles have been published in trade magazines, he often speaks at industry events, he has produced

three HVAC sales training DVD's.

He particularly enjoys bringing cutting edge training approaches to our industry. Visit

www.sellingtrust.com.

Goodman
Air Conditioning & Heating



DESIGNED
ENGINEERED
ASSEMBLED
IN THE
U.S.A.

At Goodman, we believe in American dependability. Units are designed, engineered and assembled in the U.S.A.



Thank goodness for Goodman®

Our continuing commitment to quality products may mean a change in specifications without notice.
© 2019 Goodman Manufacturing Company, L.P. · Houston, Texas · USA

www.goodmanmfg.com



System Temperature Testing: Use the Right Instruments

I think we can all agree that during performance testing, some measurements are easier to do than others. When it comes to testing, we have to figure out if the juice is worth the squeeze. System temperature measurement can eat up a lot of time on the job and cause you to question its value.

System temperatures help you calculate duct system heat gain and loss, and help pinpoint issues like lack of insulation and duct leakage. When you add system airflow to them, you can calculate delivered Btus into the occupied space.

The number of tests needed for reliable average return grille and supply register temperatures require a minimum of five accurate measurements. As Performance-Based contractors, we need to select test instruments that are accurate. Before purchasing an instrument, always consider the following three different factors ... Quality, Accuracy, and Warranty.

GROWING PAINS

When looking back at the first time I added system temperature measurement to my performance testing, I experienced some major growing pains. I only had two psychrometers. Trying to accomplish a system temperature test with just those instruments was hard, to say the least. It added 45 minutes to the testing I was already performing.

In those days, my temperature testing started at the grilles where I measured dry bulb and wet bulb temperatures. Then I had to run over to the three supply registers. Next, I'd go back over to the return grilles, one more time, to make sure the temperature didn't change.

Keep in mind, I was trying to perform this test in a timely manner. In quite a few cases, it led to inaccurate calculations because of the temperature changing every couple of minutes.

So why did I only have two psychrometers?



Because I had to work with what I had at that time and what fit my budget as a technician.

Furthermore, in those days the quality of instruments was not great. I felt that if I sneezed, they would break! Seriously, the instruments were not built for technicians in the field and the warranties on them weren't the best. Every time I sent my instruments back for issues, it always came at a cost.

Eventually, some instrument manufacturers developed better quality options, based on technician feedback. The best news: these newer, better instruments were less expensive and were rugged (meaning they wouldn't self-destruct when dropped).

DO YOURSELF A FAVOR AND RESEARCH THE LATEST DEVICES ON THE MARKET. YOU WILL BE GLAD YOU DID!

GETTING SMARTER

When I finally had enough, I trashed those old psychrometers and upgraded to five Fieldpiece single-wand psychrometers with an HG3 data logger. All five psychrometers could communicate to one handheld device (which was great). No more running around customers' houses like a mad man trying to quickly collect temperatures.

However, I still felt the time savings could improve because of how much time it took to set up the instruments. I had to sync all five probes to the data logger, then figure out how

to secure the probes to the registers and grilles. When it came to documenting the measurements, I had to physically go over to each instrument and switch them from dry bulb to wet bulb temperature.

Still, this was much better than how I used to do it.

The price for the above set was still expensive for me -- I can still remember the chewing out I got from my wife! However, I gained the quality, accuracy, and better warranty I needed and wanted from these instruments.

Bottom line, I could gather all my

Schedule Onsite Training Today!

NCI
National Comfort Institute, Inc.

**Certification Training
at Your Company!**

Let NCI schedule a customized training program designed specifically for your needs, and get your entire team trained and certified/recertified at one low price.



Call 800.633.7058 or email MikeF@ncihvac.com



UR UNITED REFRIGERATION INC.

**One-stop shopping
for all of your HVAC/R needs.**

Local and regional inventory to get you back on the job fast. With branches and distribution centers across the country,
United is truly united!

www.uri.com



temperature measurements at one time and if dropped, the instrument kept working. Best of all, if I had any issues with it, the manufacturer took care of it.

IT KEEPS GETTING BETTER

The good news is that instrument manufacturers keep getting better and their options keep improving. In my case, Fieldpiece recently released upgraded psychrometer probes with a flexible wand and magnet. Now I don't have to be creative securing the probe to registers and grilles. Other manufacturers products do similar things.

Some of the best features of modern instruments are they sync with smartphones, and some have a 360-degree range (you no longer need to buy a

second device to display all the measurements at once).

These instruments are perfect for both residential and commercial work. The price can be spot on for anyone in any stage of their career. The Fieldpiece product costs around \$500 for a set of five – almost a 70% savings from the original set I used. Each probe will display dry bulb temperature, wet bulb temperature, relative humidity, dewpoint, and enthalpy.

The time to gather system temperatures is now about 15 minutes – you can't beat that!

So, if you questioned adding system temperatures to your testing or just want to find the right instru-



ments to save more time while testing, do yourself a favor and research the latest devices in the market. You will be glad you did and skip the headaches I encountered along the way! 



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.

By Mike Weil

The Training Investment: Why Keep Employees Sharp?

Henry Ford allegedly once said, "The only thing worse than training your employees and having them leave is not training them and having them stay." This statement, which I always attributed to HVAC Consultant Vicki LaPlant, will never lose its relevance.

In his October 29, 2018 *Harvard Business Review* article, Ron Carucci cites a *2017 Training Industry Report* (ncilink.com/TrainingRpt) that says U.S. companies increased their training and employee development by a whopping 32.5% in 2017!

He also said that many experts emphasize the importance of employee development, citing the following benefits:

- A more competitive workforce
- Increased employee loyalty and retention
- Higher employee engagement
- Flexibility in the marketplace.

In the High-Performance HVAC Industry, many owners and managers are downright focused on training and they invest heavily in both their field service and installation crews as well as their office and warehouse teams.

All the contractors we spoke to say that in an effort to stay abreast of changes in technology, tools, and instruments, they are driven to train their teammates continuously.

Here are some thoughts on why four contractors put their money where their mouth is when it comes to training and how that impacts the success of their Performance-Based Contracting™ firms.

THE 'WHY' OF TRAINING

Bobby Bevill is the service manager for Davis Services, Inc. in Spartanburg, SC. This 46-year-old, \$15 million HVAC and plumbing company operates in an area that really only has

one season – cooling. When the weather is hot, area contractors get burn-out busy, make lots of money, and have to hope that tides them over when outdoor temperatures cool off and become more comfortable.

At least, according to Bevill, that is how it used to be for Davis Services before they changed their focus to becoming a Performance-Based Contracting™ firm.

"With 29 HVAC service technicians and 12 installers, it's just not smart to send them out to work in peoples' homes if they don't know what they are doing," he says.

"With the investment we make in technical training, we do airflow tests all the time, even during our busiest months. We can't always do the additional work right then, but we can go back when things slow down, to do further testing that often results in duct renovations as well as replacement and accessory sales," he says.

"We sell lots of renovations and replacements when our competition is begging for work."

For **Troy Jansen, general manager of Jansen's Heating and Air** in Effingham, IL, his parents (Tom and Cindy Jansen) have always promoted training to set them apart from competitors.

Troy, who has worked in the business since 2006 says, "Training enables our technicians and our company to out-perform most of our competitors. They just aren't training at the level we are, and very rarely do we hire techs away from them. We prefer to grow ours from the ground up. We haven't hired anyone with experience in the past five years."

This \$4.2 million gross sales company sets aside between two and five percent of their revenues for training – including a large investment in their own training center combined with outside training organization affiliations.

The 'why' for **Wigton's Heating and Air**

"TRAINING ENABLES OUR TECHNICIANS AND OUR COMPANY TO OUT-PERFORM MOST OF OUR COMPETITORS."

–TROY JANSEN

Baker
Distributing Company
www.bakerdist.com

INTRODUCING THE
GRAND AIRE®
ADVANTAGE WARRANTY

From compressors to outdoor coils, Grandaire has you covered.*

Grandaire products come with a 1 year Advantage replacement warranty that includes a labor credit.

WHAT'S YOUR ADVANTAGE?

- ▶ Easier to install
- ▶ Easier to service
- ▶ Quieter operation
- ▶ Smaller footprint
- ▶ Tin plated evap coils
- ▶ Now offering 16 SEER

Visit www.bakerdist.com to find a Sales Center in your area

GRAND AIRE®
Heating & Cooling Products

*Grandaire Advantage Warranty is only valid with an AHRI matched system. Labor credit is only valid with proper authentication from technical service advisor. See store for details.

TRUST ME, I'M A PROFESSIONAL

#1 LEAK DETECTOR

WIN AN H-10 PRO!

Register to win an H-10 PRO leak detector, Veto Pro Pac & other items at mybacharach.com/spring-2019.

800-736-4666 **BACHARACH**

Conditioning revolves around what President Ric Schorer calls his three foundational pillars for success: Recruitment, Marketing, and Training.

“Assuming your written processes are in place and you have hired the right person,” Schorer says, “I believe that without consistent training, you will fail your employee and they will either quit or execute their responsibilities very poorly.”

Schorer, whose San Luis Obispo, CA-based company invests a minimum of 150 hours of training per employee, puts together a 12-month calendar and posts it in their training lab. He says their technicians know exactly what is expected of them and they are engaged in enhancing their careers and serving their customers best.

TRAINING PAYOFFS

At **Masterworks Mechanical, owner and president Vic Updike agrees.** He says “Our team has an untrainable dedication to Masterworks’ image and our customers’ well-being. It comes from the culture, the family approach to management, and empowerment. And others see this and find it attractive as a place



for them to work too.”

The Craig, Colorado-based residential and commercial contracting firm employs 27 co-workers and dedicates up to two percent of their annual gross budget on training.

“We measure everything,” he explains, “Before and after every job. Our technicians do airflow and combustion tests which provide us the numbers we need to prove our solution worked. No one else in our area does that. We can offer products and services nobody can compete with and we can name our price.”

The winners here really are everyone: the customers get comfort, energy efficiency, health, and safety issues resolved; distributors see fewer callbacks and warranty issues, and the contractor grows profits and markets as a result.

“Training is immediately translated into the field, enhancing our technicians’ skills and performance as well as benefitting our customers,” says Bobby Bevill of Davis Services. “It helps our people feel confident in what they’re doing.”

In fact, he says that Air Upgrades are now a large part of everything they do. “We quote them on every single job,” Bevill says.

The direct result: growth. And that means they need to always look for more people.

Another direct benefit is that by training, especially in High-Performance Contracting, contractors can and do smooth out the hills and valleys of weather and season that can impact an HVAC company.

In fact, Bevill mentions that in the past, during “slow years,” if it weren’t for their training regimen, they



wouldn’t have been able to keep their people busy and would have had to lay them off or worse.

WHAT TYPE OF TRAINING IS BEST?

To really provide meaningful training in this area requires more than just a classroom setting – it requires a lot of hands-on experience as well. This is what Ric Schorer says is key to success.

For Wighton’s Heating and Air Conditioning, it also means the tech needs to be open to learning new things and relearning things they think they know.

He says the key to his company’s program is to ensure their field team is proficient in the use of tools to measure, read wiring diagrams, then interpret this information on functioning equipment (in the presence of their peers). They conduct this type of training weekly.

Masterworks also conducts weekly, in-house training to go over all aspects of the products and services they offer.

“But we also invest in professional training such as that provided by the National Comfort Institute (NCI),” Vic Updike says.

Both Bobby Bevill and Troy Jansen are big believers in bringing outside experts into their companies as well.

MANAGEMENT IS KEY IN A COMPANY THAT TRAINS

Jansen says their company management team is very closely involved in

their training strategy. They always make sure that at least one member of the management team is involved.

“We do this so we can not only keep up with what the team is learning, but equally as important, we can make sure what they learn is properly implemented in our daily culture. We do this through rigorous and continuous in-house sessions to keep what they learned at the forefront of their minds. It’s our job to come up with the training plan, implement it, and keep it rolling forward,” he adds.

Bobby Bevill says that the management team at Davis Services works hard to make training a key part of their culture. He says the results speak for themselves.

“The key is for your culture to include

continuous training. We just don’t train once and hope it sticks. We train and retrain until the tech knows their stuff better than anyone else in our area.”

Ric Schorer says that Wighton’s training is “driven by our ability to measure the performance of the entire system, to be able to describe why the system doesn’t function to customer expectations, then provide options and choices so customers can buy what they need immediately, and schedule what they want down the road.”

TRAIN FOR THE RIGHT REASONS

Going back to that Harvard Business Review article, author Carucci says, “Training can be a powerful medium when there is proof that the root cause of the learning need is an unde-

veloped skill or a knowledge deficit. For those situations, a well-designed program with customized content, relevant material, skill-building practice, and a final measurement of skill acquisition works great.”

He adds that “Learning is a consequence of thinking, not teaching. It happens when people reflect on and choose a new behavior.

Bobby Bevill concludes that training must be part of a company’s culture. He says “Our guys know they will always be learning new things. And they expect that. They see the training we provide helps them to solve issues most of the competition can’t. They get lots of positive feedback from customers.

“Which is why it’s our mission to send them into the field well trained.”

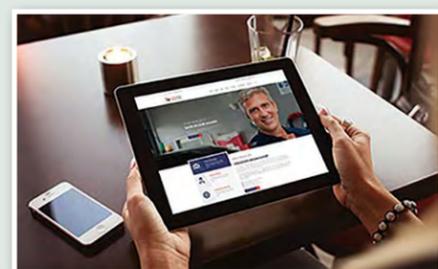
Introducing Partner RevuKangaroo

National Comfort Institute is pleased to introduce our newest partner, RevuKangaroo – an online reputation management service. They can automatically gather all reviews posted online about your company on third-party sites (Yelp, Google, BB, Facebook, and more) and help you make the most of them.



Why is this important? It allows you to tame the internet beast, to better manage your online reputation, improve employee relations with customers, and take care of any customer concerns before they get posted to review sites.

RevuKangaroo centralizes all your reviews so you don't have to hunt all over the internet for them. They offer the following benefits:



- Send customers to your website to leave a review
 - Allow customers to rate your employee's service
 - Publish positive reviews to popular third-party sites
 - Provide you instant review notification and real-time reporting
 - Provide social sharing of your reviews.
- Furthermore, as a participant in the Training Incentive Partnership Program (TIPP), NCI members earn NCI Bucks

whenever they purchase services and products through RevuKangaroo.

Learn more here (ncilink.com/RevuKangaroo).

Be sure to sign up here: ncilink.com/RKTIPP.

If you have any questions, call our Customer Care Help line at 800-633-7058.

High-Performance Talk: Are You Missing Out?

Last year, National Comfort Institute (NCI) updated our members-only email discussion forum to improve your daily peer-to-peer communications. It is called *High-Performance Talk* and it is an easy-to-use, fully featured website.

The cool thing is, you don't have to go to the website to interact with your fellow members – you can do it completely through email – once you've set up an account and created a password.

The biggest benefit for you is that once your account is set up, you never have to log in again (unless you go to the website). All your discussions can be done via email.

To do that, you just use the following email address: hptalk@highperformancetalk.com. Creating your account is easy. Just call our Customer Care help line at 800-633-7058 and one of our representatives will get you all set up. It's a valuable part of your membership and won't take long to do. Once that is done, you can adjust the settings on your account to make the site work best for you.

Already have an account, but forgot your password? No problem. Just go to HighPerformanceTalk.com and click "Log In" then "I forgot my password," then enter your email address and the "Reset Password" button.

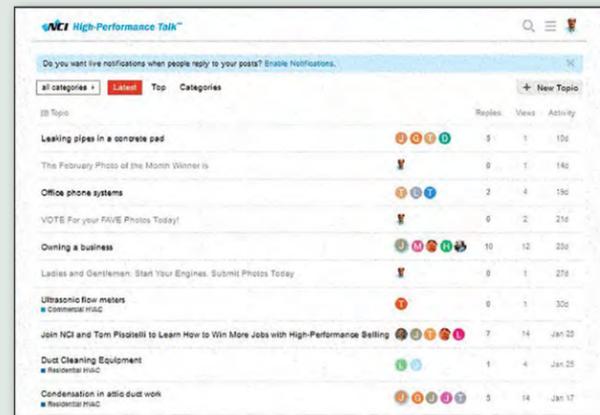
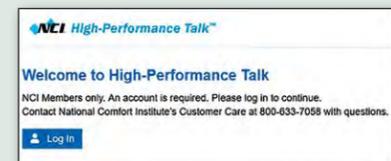
By the way, be sure to add @highperformancetalk.com to your 'safe senders' or whitelist for your email to make sure that you get emails from the site.

What kind of emails? They are conversation threads on a variety of topics that affect your business and the industry. They can be questions about specific products, advice on what to look for in after-hours answering services, suggestions for soliciting engineers, or anything you are interested in sharing or asking about.

So, don't miss out. Get set up and get involved.

There's an entire world of Performance-Based Contractors out there facing the same issues you are. Draw upon their experiences and share your own.

The wisdom of the high-performance contracting crowd can not only benefit your business, but your life as well.



This is the High-PerformanceTalk main page that shows all the discussion threads.

"Leakage test? What's that?" — Patrick Wilks, Wilks Air Conditioning, San Antonio, TX



This is just one of 12 supply outlets in the home. All had the same treatment: "Custom" register boxes, no collars, no thought of sealing to the sheetrock. The flex wasn't even taped to the register box. Truly plug and play. No worries, the grill will cover it.

Pat Wilks from Wilks Air is the April 2019 winner of our Photo-of-the-Month contest, as voted on by the subscribers to the <https://hvactoday.com/monthly-issue/> 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 ncilink.com/POMSubmit and fill out the information as requested.

THE MAY CONTEST OPENS ON APRIL 08, 2019.

That gives you plenty of time to submit something in any of our three categories: **The Good, The Bad, WTH (What the heck).**

UPCOMING 2019 NCI TRAINING SCHEDULE

Airflow Testing & Diagnostics
Apr 18: Orlando, FL

Airflow Testing & Diagnostics and Refrigerant-Side Performance
May 21-23: Tulare, CA*

Duct System Optimization & Residential Air Balancing Certification Program
Apr 9-11: Clear Lake, IA
Apr 9-11: Earth City, MO
Apr 9-11: Los Alamitos, CA*
Apr 23-25: Jacksonville, FL
Apr 30-May 2: Cleveland, OH
May 7-9: Phoenix, AZ
May 21-23: Fairfield, NJ

Residential HVAC System Performance & Air Balancing Certification Program
Apr 30-May 2: Centennial, CO
May 14-16: King of Prussia, PA
May 21-23: Omaha, NE

Commercial Air Balancing Certification Program
Apr 16-18: Los Alamitos, CA*
May 7-9: New Hudson, MI

Commercial HVAC System Performance Certification Program
Apr 9-10: Houston/Jersey Village, TX
Apr 23-24: Tulare, CA*
Apr 30-May 1: Richmond, VA
May 7-8: Boston, MA
May 14-15: Sheffield Lake, OH
May 14-15: Los Alamitos, CA*

Combustion Performance & Carbon Monoxide Safety Certification Program
Apr 9-11: Pittsburgh, PA
Apr 18: Orlando, FL (recertification)

* Subsidized NCI training offered by Southern California Edison

Performance-Based Selling Bootcamp
Apr 30-May 2: Los Alamitos, CA*
May 7-9: Austin, TX

Introduction to Hydronic Testing, Adjusting, & Balancing
May 16-17: Sheffield Lake, OH
May 29-30: Los Alamitos, CA*

National Balancing Council Commercial Balancing with Certification
May 6-10: Los Alamitos, CA*

Optimize Economizer Performance with Certification
Apr 25: Tulare, CA*
May 16: Los Alamitos, CA*



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

THE NEW FLAT RATE
DONE FOR YOU
FLAT RATE PRICING
IN A MENU!



Schedule your demo today!
www.TheNewFlatRate.com
 706.259.8892

Arzel Zoning Technology, Inc.
Comfort College NATE & OCILB accredited

March 15, 2019
 April 26, 2019

Learn how Zoning can add comfort and value to your customers' home

LEARN MORE

TO YOUR **Success**

"Delightful!"

★★★★★

"The best surprise"

★★★★★

Customer Delight Made Easy

SEE HOW >

Arzel Zoning Technology, Inc. | ArzelZoning.com32
 Bacharach, Inc. | www.mybacharach.com.....26
 Baker Distributing Company | BakerDist.com.....26
 Dwyer Instruments, Inc. | www.dwyer-inst.com 2, 29
 Fieldpiece Instruments, Inc. | www.fieldpiece.com.....10
 Goodman Manufacturing | www.GoodmanMfg.com.....6,23,35
 Jackson Systems | www.JacksonSystems.com21
 Lazco Corp. | www.LazcoCorp.com.....32
 R.E. Michel Company | www.REMichel.com.....14,29
 RevuKangaroo | <https://revukangaroo>.....9
 ServiceTitan | www.servicetitan.com.....15
 The New Flat Rate | www.TheNewFlatRate.com.....21,32
 To Your Success | ToYourSuccess.com10,32
 TSI Inc. | tsi.com.....4,15
 United Refrigeration Inc. | www.uri.com.....25

To Subscribe to High-Performance HVAC Today:
ONLINE: Visit HVACToday.com/subscribe for a FREE digital subscription.
PRINT: 1 year/\$72; single copy \$7. Canada: 1 year/\$92; single copy \$9. Payable in advance with U.S. funds. Prepaid subscriptions may be sent to: High-Performance HVAC Today, PO Box 147, Avon Lake, OH 44012. Phone: 440-949-1850; toll free 800-633-7058; FAX 440-949-1851, or visit HVACToday.com/subscribe to order online.



HIGH-PERFORMANCE HVAC TODAY

Publisher
 Dominick Guarino

Editor-in-Chief
 Mike Weil

Art Director
 Connie Conklin

Online Development Director
 Brian Roseman

Circulation Manager
 Andrea Begany- Garsed

Editorial Assistant
 Marge Smith

Email us at advertising@hvactoday.com with your comments or for more information.

Save 25-50% on HVACR EQUIPMENT Purchases

TURN YOUR SURPLUS INVENTORY INTO WORKING CAPITAL!



LAZCO CORP. Buys and Sells surplus HVACR equipment, chillers, boilers, rooftops, generators, transformers, and other equipment.

Carrier 500 ton Water Cooled VFD Chiller 2013 with Evapco Stainless Cooling Tower \$77,000 for the pair loaded FOB Georgia

Trane 155 ton Air Cooled Chiller 2007 year with R134 with Coated Coil \$24,000 loaded fob Atlanta

New Carrier 800 Ton Water Cooled Chiller \$88,000 Loaded on Truck

New Arrivals 50 ton Trane Roof Top 460 volt with Gas Heat \$18,000 fob Las Vegas used 1 year

2 New Daiken 50 ton roof tops VAV with Gas Heat \$28,000 each

For a Prompt Purchase Quote Please Send Your Surplus List to Lazcocorp@gmail.com

Steve Lazar
 480-265-9980
www.lazcocorp.com

Send equipment requests to Lazcocorp@gmail.com



Subscribe to High-Performance HVAC Today

High-Performance HVAC Today magazine highlights news, commentary, and technologies that impact performance-based HVAC contractors and their customers.

Visit our website to sign up for a FREE digital subscription or to order a printed subscription for one year (12 issues).
 \$72 USA, \$92 CANADA



Go to <http://ncilink.com/subscribe> or scan this QR code to sign up online



1-800-633-7058 • www.HVACToday.com

High-Performance Contracting Myths Debunked



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

For nearly 30 years, NCI has had the privilege of working with tens of thousands of contractors across North America to help them become more performance-based. Unfortunately, for every company that follows through and is successful at it, at least two do not. We often hear from those who didn't implement right away, beating themselves up for not getting started the first time.

As you can imagine, we've heard hundreds of excuses for not moving forward. Because there's not enough room on this page to address all of them, I'll share with you the ones we hear most often.

One of the most common objections is, "It might work elsewhere, but not here." These contractors tell us how their market is too small, or too large, or too suburban, or too rural, or too urban, or too poor, or too rich. Get the picture?

The truth is thousands of companies across North America are able to make performance work, regardless of population count, demographics, or size.

Interestingly, while some of the most successful Performance-Based Contractors are in small communities in semi-rural or rural areas, many NCI-trained companies in big cities and suburbs are also having great success.

The truth is people are people, no matter where they live or their walk of life. It's about connecting with and educating them on why they don't have to live with sub-standard comfort systems, poor IAQ, and high utility bills.

When you show a homeowner through testing why they have these issues, there's no need to hard sell them; nine out of 10 will be interested in learning more.

Another common reason for not selling Air Upgrades and renovations is, "We can't make enough money at it," and "It reduces the amount of regular installations we can sell and install."

Actually, if you price an upgrade or renovation project to earn the correct gross profit dollars per man-day, it shouldn't matter whether your installers are renovating systems or installing equipment.

In fact, successful Performance-Based companies make higher gross margins on system improvements than equipment installations. Now that doesn't mean you shouldn't sell equipment – that would be ridiculous. The two not only go well together, but the best results often occur when you replace equipment and upgrade or renovate a system at the same time.

Another common concern is "My techs won't test and generate leads." This is mostly a matter of training and confidence. They need to be given the opportunity to practice, and yes, even fail – but not in front of the customer.

They should practice on your systems, on their homes, even their relatives' homes. Even a seasoned professional concert violinist wouldn't think of playing a piece for the first time in front of a live audience!

Finally, a common excuse for not selling high performance is not being able to do as many maintenance calls if they are testing and talking to the customer about their findings. This topic will be addressed by Biloxi, Mississippi contractor Jim Ball, at the NCI Summit this April.

I could fill a page on why it's so wrong to expect your maintenance techs to run four to five or more calls a day. But in short, the whole purpose of a traditionally low-margin maintenance agreement is to generate additional service and installation work that is often badly needed. Two to three maintenance visits a day will yield far more profitable business when done right with performance testing and customer education.

Speaking of Summit, we hope to see you in Orlando this year. It's shaping up to be our biggest and best Summit ever! 

Goodman
Air Conditioning & Heating

PROUD SPONSOR OF



Goodman is a proud sponsor of Lifetime Channel's television series Military Makeover® that helps create better homes for our American veterans. Goodman donates high-efficiency HVAC products for these veterans and their families. Local Goodman® brand dealers also donate their time to install these upgraded systems providing support to veterans in their local community.

This TV series salutes those that have risked their lives, offering hope and a helping hand right here on the home front.



Our continuing commitment to quality products may mean a change in specifications without notice.
© 2019 Goodman Manufacturing Company, L.P. Houston, Texas · USA

www.goodmanmfg.com

At Goodman, we believe in American dependability. Units are designed, engineered and assembled in the U.S.A.



APRIL 6-9, 2020 • SCOTTSDALE, AZ

SAVE THE DATE



High-Performance HVAC SUMMIT 2020



www.NationalComfortInstitute.com • 800.633.7058 • GoToSummit.com