



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.

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HIGH-PERFORMANCE HVAC TODAY™



MANAGEMENT:
Use HVAC Software to Improve Performance

How do you assure your techs consistently gather correct info and properly diagnose systems? Here are some tips.



MARKETING:
A Content Marketing Primer for Performance-Based Contractors

Think you don't need content marketing? Think it's too expensive with no return on investment? Think again!

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SALES:
Our Evolution with Performance-Based Sales

Contractor and Summit Speaker Michael Hyde explains how implementing Performance-Based Sales changed his company.



SALES:
ABC's of High-Performance HVAC Contracting, Part 10

This month, Dominick Guarino focuses on how to generate sales leads with little or no competition.

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FREE Monthly Download



The May download explains how to *access the refrigerant circuit using the Fieldpiece SMAN 460 Manifold*. This is a procedure for technicians to help them know when to install gauges and what to do BEFORE accessing the refrigerant circuit.

It includes a six-step process for confirming airflow as well

as a seven-step procedure for purging all air and contaminants from the manifold and hoses. If you use the Fieldpiece SMAN 460 manifold, keep this download handy.

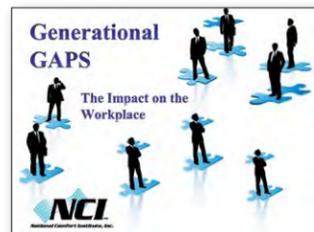
Just go to ncilink.com/MonthlyDL, or use your phone with the QR Code below.

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



Online University

Featured this month is the fourth module in our *Customer Service Training* series. **Generational Gaps - The Impact on the Workforce** teaches you how to deal with a multi-generational workforce. Managers will learn how to adapt their style to capitalize on each generation's strength to create a better team. The course includes a downloadable grid that defines



each generation's characteristics including:

- Attitude towards authority
- Messages that motivate
- Work styles
- and so much more.



Go to ncilink.com/ou0519 to learn more.

BLOG POSTS

SUPERCHARGED SERVICE WITH PERFORMANCE-BASED DIAGNOSTICS



Rob Falke writes, "A service manager reviewing the week's service records called me to report a tell-tale pattern: his technicians consistently repeat the same 10 to 15 repairs."

In this blog, Rob examines the impact when techs slip into autopilot and fail to search for performance-based solutions. Read more at ncilink.com/supercharged

10 TIPS FOR PROVIDING SUPERIOR HVAC CUSTOMER SERVICE



Part of our legacy series in tribute to NCI's Nita Brooks, we provide this timeless customer service blog. She writes about building relationships to set the groundwork for success. Nita passed away in 2016.

Read more here: ncilink.com/CServ

Heard Around the Web ... HOME SERVICES PROVIDER BUYS HVAC CONTRACTING FIRMS

In March, Franchisor Neighborly® (formerly the Dwyer Group) announced 2018

to be a milestone year in terms of acquisitions and growth. Neighborly grew to a total of nearly 3,600 franchises across nine countries in 2018.



a community of home service experts

The company sold a total of 325 new franchise units across its brands. In addition, the company's annual systemwide sales reached a total of \$2 billion.

"This past year was a period of transformation and growth for Neighborly," said Mike Bidwell, president and CEO. "We changed our company name after 37 years from Dwyer Group to Neighborly, completed three major acquisition deals, and put our company on a new growth trajectory."

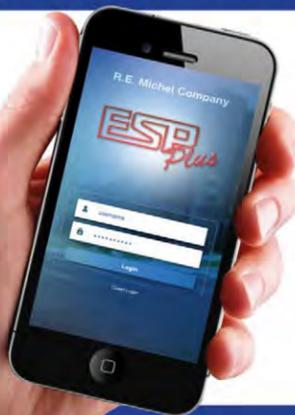
Neighborly is a home services platform that connects consumers to the trades. Learn more here: ncilink.com/neighborly.



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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

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www.GoodmanBusinessToolbox.com

For questions, please email GBTB@goodmanmfg.com or call 713-856-1853.

The business toolbox programs are presented by Goodman® and administered by third-party training organizations. All training programs are designed to support independent HVAC contractors who sell Goodman brand products. Any costs for the training programs are determined and charged directly by the third-party training organizations.

Your Online Business Reputation Can Make or Break You

Last month I talked about your Performance-Based Contracting™ brand and how that can help you dominate your marketplace. What I didn't bring up is the importance of your reputation. This is a very important part of your brand and is something you should really pay attention to.

You really only get one chance to make a great impression to potential customers and then, once you have them as customers, you have to work hard to keep them. Your reputation is central to this.

In the past, companies built their brands reputations through traditional methods – word-of-mouth, advertising, direct mail, and so on. Those methods, by the way, are still valid, but now you have to think about your “online” reputation as well.

Why? With the ever-more dominant millennial generation, that reputation, especially what they find online, is one of the most important “hooks” they use to determine whether they want to do business with you or not.

Most of us are quite familiar with this phenomenon, but for kicks, here is the definition of reputation management I found on Wikipedia:

“Reputation management is the influencing and/or control of an individual’s or business’s reputation. Originally a public relations term, the advancement of Internet and social media use, along with reputation management companies, have made it primarily an issue of search results.”

The point is that online reputation isn't much different from word-of-mouth except it is exposed instantly to tens of thousands potential customers. Oh, and it is up there pretty much forever.

No matter what you do, people will post good news and bad news about your company online

every day. Some people say that any “press” is better than no press. But if *any* includes negative statements about your company, its services, people, and products, how is that good? The answer: it isn't.

So – do you know what your online reputation is? Are you proactive at staying on top of it? Do you ask for reviews? Do you quickly respond to them? These are some of the actions necessary to really manage your reputation, stay ahead of your competitors, and attract not only new customers, but potentially new employees as well.

If you ignore this aspect of your overall branding strategy, your online reputation can negatively impact your business. Your worst enemy is complacency. As I said before, your “digital footprint” never really goes away. So it's in your best



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**YOUR WORST ENEMY IS COMPLACENCY.
REMEMBER, YOUR “DIGITAL FOOTPRINT”
NEVER REALLY GOES AWAY.**

interest to stay on top of your reputation and take care of customer issues in a fast, positive manner.

Read more about reputation management at ncilink.com/Reputation. Be sure to also read about how you can strengthen and grow your reputation and brand through **content marketing** ([page 22](#)).

Speaking of digital footprints, we dedicate this issue to the digital solutions side of managing a successful High-Performance HVAC Contracting company. We cover software that helps close more sales ([page 16](#)) plus other digital tools that help you on your mission to measure, diagnose, and solve customer issues ([page 9](#)).

Branding and reputation are important keys to a successful HVAC business. So how are you managing yours? NCI

Events and Announcements: HVAC Industry Milestones



Johnson Controls Opens HVAC Rooftop Center of Excellence

On April 17th, Johnson Controls officially opened its brand new state-of-the-art Rooftop Center of Excellence design, manufacturing, and testing facility in Norman, OK.

In a recent press release, the company announced the opening of the 900,000 sq. ft. facility that includes almost 400,000 sq. ft. of incremental laboratory and manufacturing space, plus renovations to more than 150,000 sq. ft. of office and meeting space.

The plant includes a two-story, 52-ft. high testing lab, roughly the size of one-and-a-half football fields. The laboratory offers an environment that allows Johnson Controls to conduct on-site, complex development, regulatory compliance, performance, safety, and reliability testing, including the ability to test a 150-ton rooftop unit in climates ranging from -30°F to 130°F.

"The need for high-efficiency rooftop units has grown as customers demand simplified solutions to achieving sustainability," said Philip Smyth, director of product management, applied DX, Johnson Controls.

"The combined testing and manufacturing location allows us to better serve our customers while enhancing HVAC technology through collaboration and innovation."

You can read the entire press release here: ncilink.com/JCIRTs and can learn more about Johnson Controls rooftop units here: ncilink.com/Rooftops.

NCI 16th Annual Summit Hits Home Run

Performance-Based HVAC contractors took center stage in Orlando, FL, April 15-18 as National Comfort Institute's annual Summit got underway. Nearly 200 contractors, preferred partners, and other industry luminaries gathered in what was a record-setting event.

This year the focus centered on the High-Performance Sales and Delivery Cycle. 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 performance-based experiences with their peers.

The excitement could be felt even

during the pre-conference business planning boot camp conducted by Goodman Air Conditioning and Heating, and Amana Heating and Air Conditioning.

Then it was three days of seminars, networking events, an exciting keynote by Jennifer Bagley, CEO of the CI Web Group, and followed up with the yearly awards dinner and banquet.

There was even a post-Summit day where attendees could stay and earn or re-certify in Advanced Combustion or Airflow Testing and Diagnostics.



Dominick Guarino, CEO, welcomes everyone to the 16th Annual Summit in Orlando, FL.

NCI Partner EGIA also conducted a post-Summit leadership seminar on developing a process-driven company. Read a full recap of the event, starting on [page 12](#).

And don't forget to mark your calendars for the 2020 Summit event, which will be held the week of April 6th in Scottsdale, AZ. More on that in the very near future.

Digital Service Solutions

RIGHT-J MOBILE

Every professional contractor in the HVAC Industry is familiar with load calculation software and most are familiar with Right-J from **Wrightsoft**.



The company has created a mobile version of its Manual-J load calculation software that quickly and easily creates an ACCA-Approved Manual J8 block (whole house) load with eight accompanying reports.

Designed for use with mobile phones, tablets, as well as computers, Right-J requires an Internet connection. It allows you to access files from all your computing devices and instantly updates based on the information you enter and change.

It works in three steps:

- Customer set-up screen
- Draw the building footprint
- Choose building details.

Building details include choosing the wall, ceiling, and floor R-values, materials, infiltration, glass area percentage, and more. This info is submitted to the Wrightsoft servers via the Internet, which instantly computes the load and sends the results to the handheld device.

Results are viewed on the handheld in chart form showing each load. The information can then be imported into the full Right-Suite Universal application to create more complex room-by-room designs.

For more information, visit the Wrightsoft website at ncilink.com/RJM.

JOB COSTING AND INSTALLATION

SAWIN Service Automation, Inc. provides enterprise level software solutions for managing an HVAC company. One of its modules, SAWIN Pro Enterprise Job Costing and Installation, provides access to the firm's complete suite of job costing software.

The software uses easy-to-use templates that you create for job estimates. Templates allow your team to choose equipment, parts, and materials from inventory and labor amounts, using user-defined price sheets and margins. Proposals can be created in the field or in the office and turned into contract jobs if accepted.

In addition, they have a mobile installer solution that helps you manage your installation teams by instantly transmitting installation assignments, work orders, and tracks their progress in the field.



The mobile solution eliminates redundancies including double entry, hand-written payroll slips, and user error.

Go to ncilink.com/SJC for more information and a demonstration online.

FIELDWARE CLOUD-BASED SERVICE MANAGEMENT

This field service platform enables you to integrate it into your existing systems, without having to disrupt ERP, CRM, and/



or accounting systems. It can communicate with other Web-based products, enabling bidirectional transfer of data and automating the service chain.

This software is designed from the ground up as a mobile solution. Among its features:

- Efficient scheduling and dispatch
- Real-time visibility into work order details
- Easily integrates into existing ERP or CRM systems
- Fast and easy invoicing.

FieldAware also creates what they call "actionable reporting" using dashboard reports customized for your management needs.

In addition, FieldAware employs barcode scanning to help you instantly find inventory, asset history, order history, and customer history.

For more information and a demo, go to ncilink.com/FieldAware.

ONLINE RESIDENTIAL HVAC LOADS AND DUCT SIZING

Elite Software's RHVAC Online software is a web application that runs on all internet devices including iPads, tablets, computers, and smart phones. It can do all three code-required ACCA Manual J, D, and S calculations.

RHVAC is available in both desktop and web-based versions. The desktop has a one-time fee and works on all Windows-based computers. The online version is subscription-based.

Both calculate peak heating and cooling loads (block and room-by-room) for residential buildings and some light commercial applications in accordance with ACCA Manual J, D, and S.

Both include a complete ACCA Manual D duct sizing capability and a complete Manual S equipment selection.

You can enter data manually or automatically import it from a floor plan drawn with the optional Drawing Board program (available only within desktop RHVAC).

The Heat Transfer Multipliers (HTM values) for all the walls, windows, doors, and roofs listed in Manual J are automatically looked up by the software as needed. Additional construction materials are easily added as well.

Among its many features, RHVAC has



**COMFORTMAXX AIR™
CLOUD-BASED TESTING TOOL**

This subscription-based, easy-to-use, cloud-based testing tool from National Comfort Institute, Inc. (NCI) allows you to record and calculate System Airflow information based on static pressure measurements.

Subscribers must be NCI-certified in order to use any of the ComfortMaxx programs.

ComfortMaxx will help speed up and simplify your testing process and helps hold your technicians accountable. As a result, you can generate high-quality leads and wow customers with professional and easy-to-understand reports about their comfort systems. This helps differentiate your company as a Performance-based leader in your marketplace.

ComfortMaxx Air allows you to:

- Test static pressure and airflow
- Track customer information (for single or multiple locations)
- Separate heating and cooling tests
- Create customer reports based on location type: residential or commercial
- And so much more.

Full toll-free support is available and you can enroll up to four additional users on the application itself.

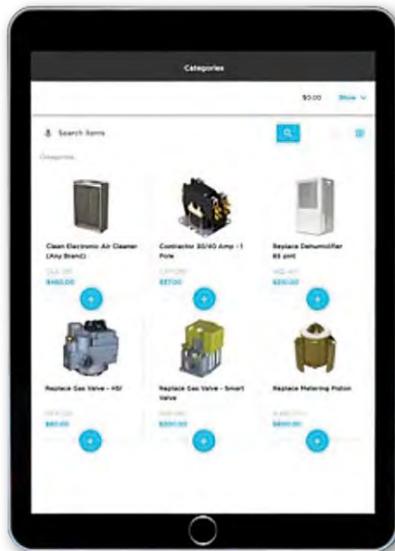
For more information, contact **National Comfort Institute** at 800-633-7058.

SERVICETITAN PRICEBOOK PRO

ServiceTitan recently released its new premium price book, *Pricebook Pro*, a proprietary solution that integrates seamlessly into the platform in as little as two hours.

ServiceTitan Pricebook Pro integrates with ServiceTitan's technician-specific toolkit, providing pre-populated images to enhance estimates and generate higher sales.

According to a press release, this turnkey information helps drive top-



line sales and protect margins while improving estimate accuracy and technician efficiency.

With preloaded services, images, and price calculators, it's easy to get Pricebook Pro up and running. Features include the ability to:

- Browse and select content
- Use in-app tools to make customizations
- Plug in material markups, billable rate, and surcharges to generate your prices.

For more information on the **ServiceTitan Pricebook**, go to ncilink.com/STPriceBook.



Cutting-edge Training from the Industry leader in Performance-Based Contracting™

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 & 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 2019 NCI Training Schedule

Airflow Testing & Diagnostics
May 21: Tulare, CA*

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

Refrigerant-Side Performance Certification Program
May 22-23: Tulare, CA*

Duct System Optimization & Residential Air Balancing Certification Program
May 7-9: Phoenix, AZ
May 21-23: Fairfield, NJ

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

Commercial Air Balancing Certification Program
May 7-9: New Hudson, MI

Commercial HVAC System Performance Certification Program

May 7-8: Boston, MA
May 14-15: Sheffield Lake, OH
May 14-15: Los Alamitos, CA*

Performance-Based Selling Bootcamp
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
May 16: Los Alamitos, CA*



* Subsidized NCI training offered by Southern California Edison

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

The High-Performance Summit Takes the HVAC Industry by Storm

Known as the theme park of the world, Orlando, FL was headquarters for National Comfort Institute's (NCI) 16th Annual High-Performance HVAC Summit last month. No, the theme was not Disney oriented: it was centered on the High-Performance Sales and Delivery Cycle.

From April 15 to 18, Performance-Based Contractors gathered from across the country to learn about this cycle, network, and discover opportunities to enhance their approach to HVAC contracting.

For the second year, Summit was open to the entire industry, including the thousands of HVAC companies that have been trained and certified by NCI.

In accordance to the theme, all the workshops concentrated on one of the key elements of the process: Lead Generation, Lead Turnover and Setting The Appointment, The Sales Process, Hand-off to Your Installation Team, and Selling High-Performance Service Agreements.

GETTING THINGS STARTED

Summit Week began on Monday, April 15th with pre-conference training sponsored and conducted by both Goodman Manufacturing and Amana Heating and Air Conditioning

Called the **Business Planning Bootcamp**, the all-day session helped contractor attendees dissect their businesses and create a roadmap to a higher quality of life.

This included examining key performance indicators, how to face challenges, and the importance of tweaking processes for a huge, positive impact on the business.

GUEST ORIENTATION AND NEW MEMBERS

The 2019 Summit had its largest group of first-time attendees who were welcomed to the event during an orientation meeting to help acclimate them to the program and events. New NCI members also attended.

The first timers then joined all other attendees for the annual Welcome Reception, hosted by Goodman Manufacturing, which set the stage for the rest of the week.

LET THE LEARNING BEGIN

Another first for Summit was holding all general sessions in the same room with the preferred partner trade show. This kicked off Tuesday morning, April 16th, as all attendees gathered and were treated to a rousing multimedia introduction, followed by an interactive game show called "Reach for the Summit."

The learning began when two random contractors from the audience were selected to answer multiple-choice questions from real world

installation and service scenarios. The audience then had the opportunity to vote, via a mobile app, for which answer they thought was correct. The contractors earned points for correct answers with the winner taking home a new NSI 3000 Low-Level CO Monitor.

Each question was followed up with commentary by David Holt and David Richardson, who discussed the merits of each answer and which way they felt the audience would vote.

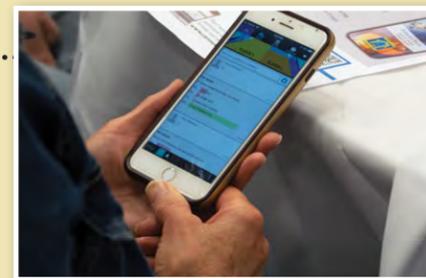
The winner was Frank Copeland of Copeland and Son AC and Heating Service, Nashville, TN. Coming in second place was Jose Montes of Kennihan Plumbing and Heating, Valencia, PA.

FIVE PERFORMANCE WORKSHOPS

Workshops immediately followed the game show with attendees spending the day in groups moving from room to room so they could attend every class.

The 2019 Workshops included:

- **Generate High Quality Leads with Performance Testing** – presented by Michael Hartman of Thomas E. Clark, Inc. and David Richardson of NCI
- **Turn High-Performance Leads into Appointments** – presented by Nancy McKeraghan of Canco Climate Care and David Holt of NCI
- **Performance-Based Selling in**



- **12 Steps, from Test to Proposal** – presented by Michael Hyde of Hyde's Air Conditioning and Rob Falke of NCI
- **The Handoff Can Make All the Difference** – presented by Dawn Vickers-Mroczek of GV's Heating and Cooling and John Puryear of NCI
- **Sell High-Performance Maintenance Agreements**, presented by Jim Ball, Ball Heating and Air Conditioning and Tom Johnson of NCI.

THE IDEA MEETING

Once again NCI hosted the Annual Idea Meeting where all contractor attendees chip in an entry fee and gather behind closed doors to share ideas on two major aspects of the High-Performance Sales and Delivery Cycle: Lead Generation and Sales.

Moderating the event was **David Squires** of Vincent's Heating and Plumbing and **Mike Weil** of NCI. This hour-long meeting was divided into two sessions: one dedicated to High-Performance Lead Generation, the other to Sales.

Attendees presented their ideas on each topic and then voted for those they felt were the best.

The winning ideas were from:

- **Jim Betlam**, John Betlam Heating and Cooling
- **Corrie Johnson**, TM Johnson Bros., Inc.

ASK THE COACHES

Immediately following the Idea Meeting, NCI hosted a new event called **Ask the Coaches**. This panel of five HVAC Industry coaches – moderated by NCI's CEO Dominick Guarino – worked interactively with



the audience to answer key customer-facing topics, including sales, marketing, and customer service.

The coaches on the panel included:

- **Drew Cameron**, President, HVAC Sellutions, Inc.
- **Brigham Dickinson**, Trainer and Coach, Power Selling Pros
- **David Holt**, Director of Business Training and Coaching, National Comfort Institute
- **Dennis Mondul**, consultant, HVAC Contractor Solutions
- **Tom Piscitelli**, Sales Coach, TRUST® Training and Consulting.

PARTNER TRADESHOW

Just under 30 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 tradeshow hours.

Exhibitors also participated in NCI's annual Preferred Partner Prize Drawing where attendees received "game cards" that had to be stickered by each exhibitor, then turned in to be eligible for the drawing.

STATE OF THE HIGH-PERFORMANCE HVAC INDUSTRY

Tuesday, April 17, 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.

In fact, Guarino told the group that he sees an increase in the number of Performance-Based

Contracting™ firms across North America as well as "an increasing awareness among consumers that there is a better way."

Guarino says this is just the beginning and feels there are some positive steps to take to make true performance more than a niche in the overall HVAC Industry.

"For starters, we need to recognize this is not an add-on service or product," he said. "It must be integrated in your company culture. Furthermore, we have to educate consumers every chance we get. Testing needs to be integrated into every maintenance visit and service call.

"In other words, success will follow behavior. If we build these habits in our businesses, they become who we are – and I can point to many of you out there who are living it and experiencing the benefits of it every day!"

THE CLOSING



In NCI President Rob Falke's closing remarks, he continued with the theme of 'teaching.'

Falke's comments focused on the powerful influence the Performance-Based HVAC technician can have if they approach their jobs and customers in the role of teachers.

"That role is to teach customers about their HVAC and air distribution systems and show them how to make the best decisions in their specific cir-



cumstances,” Falke said.

He came up with a name for the techs who take this approach – ‘Technicians.’

“The secret to influencing your customer’s purchase decisions is to teach them the principles about their problem until the knowledge you give them confirms your recommendations are true,” he said.

“Once they have trust and confidence in you, they will respond by buying the products and services they need and want as a result of what they learned.”

He concluded by saying that “Teaching closes more sales than selling,” and that is ultimately the theme of the Summit 2019 event.

RECEPTION AND AWARD BANQUET

The highlight of every Summit is the presentation of National Comfort Institute’s annual awards to deserving High-Performance contractors from around the country. This is the 13th year that NCI recognizes excellence in the Performance-Based Contracting™ industry.

Each year, NCI presents three Contractor of the Year Awards based on company size – Small (less than \$2 million in volume), Medium (\$2 to 6 million), and Large (more than \$6 million).

NCI Contractors of the Year must have implemented or are in the process of implementing performance-based testing in their companies.

Furthermore, their organizations must have a Performance-Based culture that includes training – technical and non-technical – for its field teams as well as office staff. Their companies must have a strong service department that is service agreement-based and must regularly offer system renovations in their sales proposals.

During the banquet, Dominick Guarino and Rob Falke recognized the following winners:

- **2019 Small Contractor of the Year: Punbar LLC**, Houston, Texas. Accepting the award was owner Ron Amaya
- **2019 Medium Contractor of the Year: GV’s Heating and Cooling, Inc.**, Glenview, IL. Accepting the award was Greg Vickers, president

- **2019 Large Contractor of the Year: Control Point Mechanical**, Shrewsbury, MA. General manager Nick Lupo accepted the award.

In addition, contractors are recognized with the following awards:

John Garofalo Implementation Excellence Award – This recognition requires the contractor to regularly deliver measured performance in every aspect of their business.

They keep their employees informed with visual benchmarking and/or scorecards with up-to-date performance results.

This year’s *John Garofalo Implementation Excellence Award* recipient was **Jim Ball, Ball Heating and Air Conditioning, Biloxi, MS**

David Debien Technical Excellence Award – This award is for an individual who has demonstrated having strong technical skills, especially in Air-Side and Combustion Testing.

This person regularly performs diagnostic testing on service/installation projects. The recipient is a constant learner – always seeking to improve their knowledge – and participates in sharing that knowledge by



2019 John Garofalo Implementation Award Winner: Jim Ball, Ball Heating and Air Conditioning



2019 David Debien Technical Excellence Award Winner: Michael Greany, All Pro Plumbing and Heating



2019 Scott Johnson Training Excellence Award Winner: Nick Davis for his father Mike, Davis Services

teaching others in his company.

This year’s *David Debien Technical Excellence Award* winner was **Michael Greany, All Pro Plumbing, Heating, Air and Electrical**, Ontario, CA.

Scott Johnson Training Excellence Award – This is also an individual award targeted to contractors who make training a key component of their company culture. They are willing and do share their training with other NCI members.

This year, NCI presented the *Scott Johnson Training Excellence Award* to **Michael Davis**, Davis Services, Inc., Spartanburg, SC. The award was accepted by Michael’s son, Nick Davis.

High-Performance Sales Excellence Award – This award recognizes an individual with strong technical

sales skills who performs diagnostic testing on sales calls. This person also sells a high percentage of air upgrades and duct renovations.

NCI recognized **Corey Osborn of Getzschman Heating LLC**, Fremont, NE with this award.

In addition, NCI presented its **Preferred Partner Award** to **Goodman Manufacturing**.

NCI presents this award to one preferred partner each year who demonstrates strong support of the NCI membership with special pricing, discounts, or rebates. Accepting the award was Goodman’s President, **Satoru Akama**.

The pinnacle of the evening was the presentation of the highest honor NCI bestows: the **Chairman’s Award**.

The criteria for this recognition is as follows:

- The recipient is a strong supporter of NCI and its shared mission
- This person implements all aspects of NCI’s methods in service, sales, and installation
- He or she is an excellent sounding board for NCI’s leadership
- He or she is a great contributor of ideas, energy, and their time to NCI and its membership.

The **2019 Chairman’s Award** winner was **Ron Getzschman, Getzschman Heating LLC**, Fremont, NE.

MARK YOUR CALENDARS

Missed Summit this year? Don’t let that happen again. Mark your calendars today: the **2020 NCI Summit** will be in Scottsdale, AZ at the We-Ko-Pa Resort the week of April 6th.



2019 Small Contractor of the Year: Punbar LLC



2019 Medium Contractor of the Year: GV’s Heating & Cooling LLC



2019 Large Contractor of the Year: Control Point Mechanical



2019 High-Performance Sales Excellence Award Winner: Corey Osborn, Getzschman Htg.



2019 Preferred Partner Award: Goodman Manufacturing



2019 Chairman’s Award: Ron Getzschman, Getzschman Heating



Use HVAC Software to Improve Performance

A difficult task that faces many Performance-Based contractors is getting their service team on the same page. If you've ever had a technician who seems to consistently leave out that one important piece of information or misdiagnose an obvious system problem, you know what I'm referring to.

How can you assure that your technicians are consistently gathering the right information and correctly diagnosing systems? Let's look at ways well-built software can help you with the inconsistency challenge and improve your performance-testing results.

CONSISTENT DATA COLLECTION

Software lets you predetermine the information your technicians must gather before they can close out a call. They know what's expected of them on each visit before they step out of their van. Their measurement targets are defined up-

front, so everyone aims at the same bullseye.

Controlling the test procedures and readings taken helps reduce callbacks, excuses, and missing information. It helps you hold your guys to a higher level of accountability and removes the temptation to stop measuring performance traits, like static pressure, when you get busy.

Consider this scenario: A newer technician is dispatched to a cooling call where the indoor coil is freezing up. The technician arrives and proceeds to "gauge up" to the system. He scratches his head and decides to add four pounds of refrigerant to the system and call it good.

The next day, the same customer calls back to let you know the indoor coil is still freezing up. You decide to send a more experienced technician out to see what is going on. They have no readings from the day before because the newer technician forgot to write them on the service invoice. Ouch!

The experienced technician arrives and does a visual inspection of the blower to assure it's clean and checks the blower speed. Next, they measure static pressure and discover indoor coil pressure drop is high. They pull the coil door off and see the fins are extremely dirty. After a thorough coil cleaning and second pressure drop test to verify improvement, he recovers four pounds of refrigerant from the system because it is now over-charged.

Consistent data collection and testing procedures in software could have helped prevent this.

The newer technician would have predetermined checks to perform before gauging up and probably would have caught the issue or known to call for help if he couldn't figure it out.

If the experienced technician was needed, he would have a clear picture of what he was walking into since all the newer technician's information is stored for easy access.

PROPER CALCULATIONS AND IMPROVED DIAGNOSTICS

Technicians who test performance will encounter situations that cause readings to look better or worse than they really are. They are often the result of improper calculations and can cause a technician to misdiagnose a system.

Software can help prevent these miscalculations and the er-

"WITHOUT DATA, YOU'RE JUST ANOTHER PERSON WITH AN OPINION." – W. EDWARDS DEMING

rors that come from them.

Procedures are predefined allowing testing to go faster since the technician doesn't have to rack their brain to remember all the possible tests that can be performed. The tests are clear and diagnostic accuracy increases because of it.

Improved diagnostics help technicians match appropriate repairs based on the measurements they input into the software, instead of guessing.

Your technicians can all sing from the same sheet of music since they get their information from a central source.

This prevents the unintentional throwing of one tech under the bus by another due to misdiagnosis.

Here's another scenario to consider: A technician learning to measure total external static pressure (TESP) is dispatched to a poor cooling complaint. The indoor unit is an upflow gas furnace with an external coil and filter rack on the side.

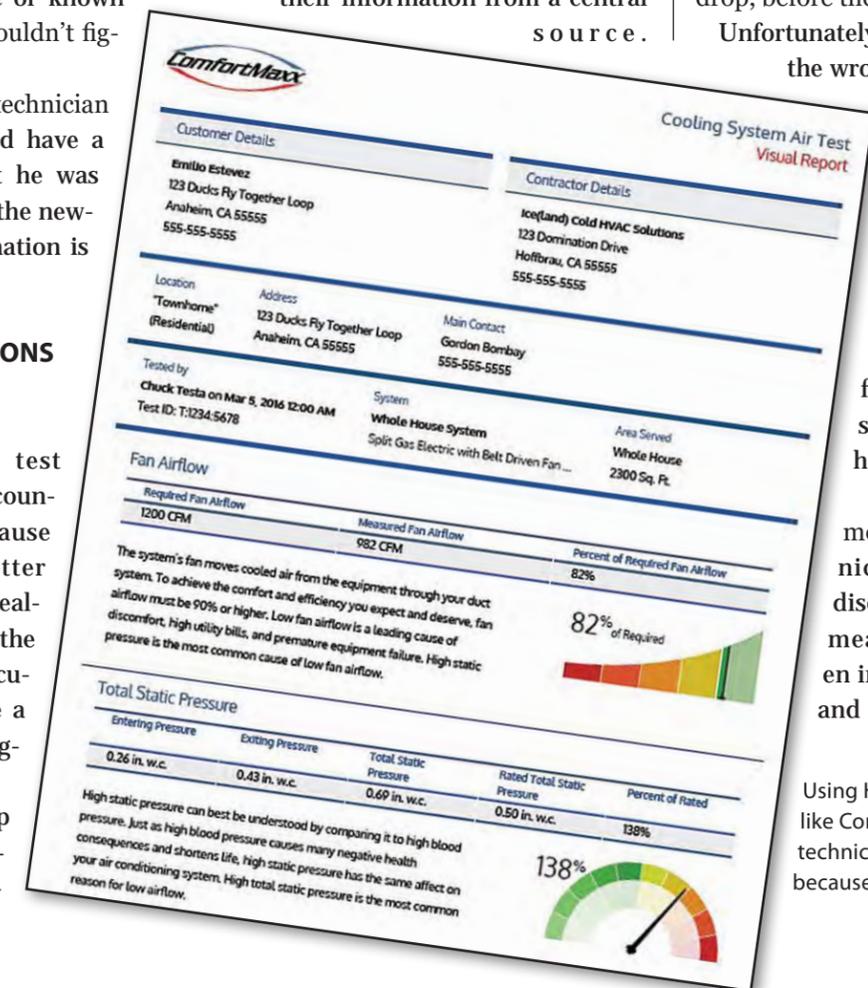
The tech is excited to measure performance but decides to go off memory. He installs test ports in the supply plenum, after the coil and in return drop, before the filter.

Unfortunately, this technician chose the wrong locations – the coil and filter should be included in these measurements. This results in readings that are incorrect and much lower than they truly are.

However, he knows from his training that something isn't right, his TESP is too low.

He decides to call a more experienced technician who helps him discover the error. New measurements are taken in the correct locations and the problem is identi-

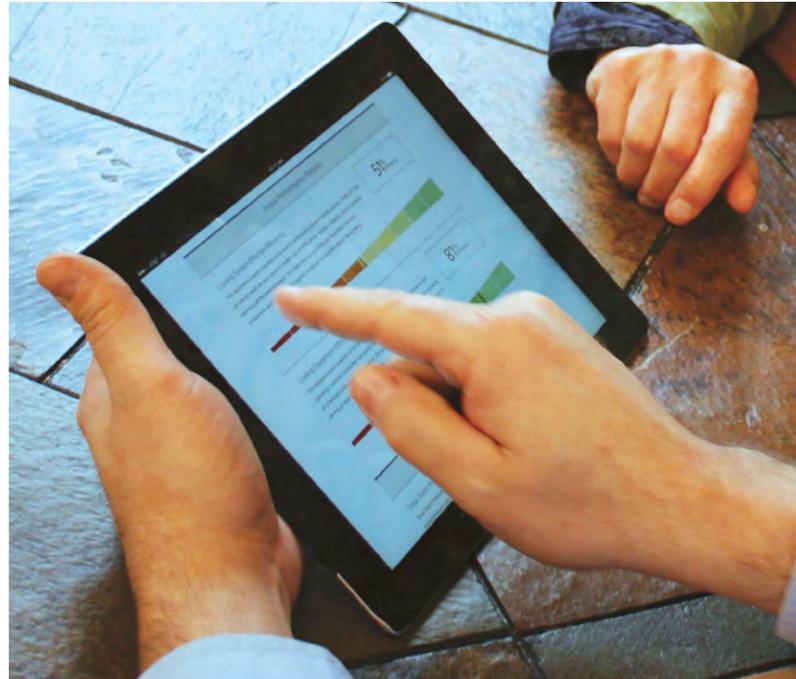
Using HVAC diagnostic software like ComfortMaxx™ can help technicians get accurate readings because procedures are predefined.



fied as a supply duct restriction that is causing low airflow.

Proper calculations and improved diagnostics available from software would help avoid this issue. The appropriate fields are shown which reveal correct test locations for necessary measurements, so the correct readings are gathered each time.

Correct readings are essential for accurate diagnostics and determining needed repairs.



SERVICE HISTORY

Think about how your medical records are handled – all relevant information is in one location that’s quick and easy to search for. In the examples above, service history was an important piece in solving the problem and tracking it.

Your technicians can use service history to review performance measurements from start-up to each maintenance visit. This helps them determine if components are getting dirty, worn down, or unexpected changes occurred.

Many software platforms have document storage that you can tie to a customer or building so the necessary documents are available when needed. Manufacturer’s performance data, fan tables, wiring diagrams, and charging charts are commonly stored documents.

THIRD PARTY CREDIBILITY

Quality improvement guru W. Edwards Deming once said; “Without

data, you’re just another person with an opinion.”

Unless you have test measurements, you don’t have any data. The reason so many get beat up on price is because they only provide their customers with opinions instead of facts.

Good software enables your customers to make informed decisions from a credible third-party source. You have a partner saying the same thing as you.

Have you ever encountered a customer’s distant relative’s opinion which bears more weight on their decisions than yours? Unless you have data that’s easy to understand, you look like another guy with an opinion.

Software can also help your customer understand what is going on with their system and translate your test results in a simple manner. Visual graphics and charts often tell a story to a customer far better than we can express.

GARBAGE IN = GARBAGE OUT

Software isn’t a silver bullet and it can’t take the place of proper training and the skills required to successfully implement it. If your techs are poorly trained and don’t have the skill set to successfully test performance, no software can overcome that.

Software should complement what you’re already doing and make your life easier. If you currently use software,

take inventory of your needs and see how it stacks up.

Some companies stick with what they have been using for decades because it’s comfortable, even though it doesn’t fit their current needs.

If you don’t use software, consider the suggestions above as you search for options to use at your company. Above all else, software must be simple to use.

If your techs have a hard time using it, don’t be surprised if they’re unwilling to change. 



David Richardson is a curriculum developer and trainer for National Comfort Institute, Inc. (NCI). NCI specializes in training that focuses on improving, measuring, and verifying HVAC and Building Performance.

If you’re an HVAC contractor or technician interested in learning more about software that can help you improve performance, contact David at davidr@ncihvac.com or call 800-633-7058.



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.

Membership Options: Turbocharge your membership with added learning opportunities and financial incentives.	 High Performance HVAC Alliance	 Learning Excellence Premium Upgrade	 Learning Excellence Live Upgrade	 Learning Excellence Online Upgrade	 Membership
Unlimited Toll-Free Support	✓	✓	✓	✓	✓
High Performance Talk Discussion Forum	✓	✓	✓	✓	✓
Find-A-Certified-Professional Lead Generator	✓	✓	✓	✓	✓
i-NCI: Mobile-Friendly Technical & Sales Tools	✓	✓	✓	✓	✓
Hundreds of Technical & Marketing Downloads	✓	✓	✓	✓	✓
Members-Only Newsletter	✓	✓	✓	✓	✓
Article Library Featuring Technical & Business Articles	✓	✓	✓	✓	✓
Live & Online Training and Conference Discounts	✓	✓	✓	✓	✓
Member Rewards NCI Training Bucks on Purchases	15%	15%	15%	15%	5%
Training Incentive Partner Program Dollars	Maximum	Maximum	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	\$4200	\$4200	\$1200	✓
ComfortMaxx Pulse™ - Air & BTU Testing Software	✓	✓	✓	✓	✓
ComfortMaxx Verify™ - Full System Testing Software	✓	✓	✓	✓	✓
Free Print Subscription to High Performance HVAC Today	✓	✓	✓	✓	✓
One Paid NCI Summit Conference Registration	✓	✓	✓	✓	✓
EGIA Premium Membership	✓	✓	✓	✓	✓
70% OFF 5-Day 2019 Success Week Bootcamp	✓	✓	✓	✓	✓
Monthly Investment:	\$999	\$750	\$450	\$450	\$100



Scan this QR code or call NCI Customer Care to learn how NCI Membership can take your HVAC business to the next level!

Join NCI Today!

Our Evolution with Performance-Based Sales

Every opportunity to work with a customer presents a unique set of circumstances. Our ability to succeed depends on our meeting their wants and needs. We have enjoyed tremendous success over the last 10 years as we've included various levels of testing and diagnostics as we sell replacement HVAC systems.

We launched our journey with National Comfort Institute (NCI) around 2000. The first few years I personally learned to use testing and began to get a grip on the diagnostics. Then we spread the NCI culture of measuring performance throughout our company.

The more we became successful in growing this culture, the more our sales and profitability increased. We are primarily a residential replacement company with 35 employees and over \$8 million in annual sales.

PALM DESERT MARKET

Our market is a little different here in the Palm Desert area of Southern California. It's not uncommon in winter months to experience 70F afternoons. Residents in our town nearly double in winter months, as many move from their homes in Canada and the Northeastern U.S. to enjoy our warm climate.

Summer finds a good portion of our population abandoning their residences, returning home to their cooler climates, escaping our 110-degree summer heat.

When snowbirds are here in winter and it's time for equipment replacement, we have a hard-to-sell scenario. It's a real challenge convincing them to invest in comfortable and efficient systems when it's 70F outside.

Using static pressure and balancing hoods helps them "see" year-round efficiency more clearly

and multiplies our ability to sell. Testing and diagnostics help our snowbird customers remember the high utility bills they paid last summer for an empty house. They become highly motivated to make sure they have an efficient system.

As we approach a sale, understanding where our customers are coming from is critical. You can imagine how the conversation and recommendations change once we know if they are full-time residents or are just here during winter. Our greeting and sales approach become critical in this situation.

If we don't ask the right questions and listen carefully, we're bound to misunderstand their position for decision-making and lose the sale. Although you may not have the same set of conditions we have, the attention you give to understand your customers' needs is just as critical.

FROM UTILITY PROGRAMS TO SYSTEM EFFICIENCY

Utility programs and energy efficiency are a big deal in our area. Southern California Edison was the national champion of the HVAC Quality Installation (QI) program for many years. NCI is a key player in helping contractors move beyond QI with testing, measuring, and diagnostics to improve HVAC system performance.

Hyde's Air Conditioning benefited from both organizations' programs which helped reduce the cost of training, provided live field coaching, and significant incentive payments to both our customers and us.

These programs have a considerable influence on our sales process because they focused on testing and diagnostics. But since the incentives went away, we have been faced with reshaping our sales approach. We picked up some good

and bad habits from utility programs, but have seen improvement by making changes to more closely mirror what NCI teaches.

However, efficiency is still top-of-mind for our customers. So, we have shifted the conversations away from utility incentives and now focus on installed system efficiency.

In that effort, we invite customers to use the balancing hood. It gives a clear picture of room comfort and we use it to calculate the installed efficiency of the system. When a customer sees their system operating at 40% or 50% of equipment-rated capacity, they see half their utility bill payment being wasted.

Testing brings many questions to the surface that address invisible issues they would not have otherwise been aware of. The answers we provide through diagnostics confirms the need for additional system upgrades.

This question-and-answer process is key to how we make sales. Talk about credibility! The fact that we test and ask questions allows them to feel better about their decision.

CODE AND BUILDING PERMITS

We are one of the few HVAC contractors that still pull permits on retrofit jobs. This has also been a major influencer on how we sell systems. The work required to comply with California's Title 24 energy code brings us credibility with our customers, but it has also allowed several detrimental habits to creep into our sales process.

California code separates sales and testing. Testing is an after-sale activity required to satisfy regulations showing the system was installed correctly. Utility programs and code compliance tend to lead us towards selling primar-

ily high-efficiency equipment. We sold the equipment replacement first, then we'd come back afterward to test and see if we could sell an add-on system renovation.

WE COMBINED TWO SALES APPROACHES

This approach really confused our customers. It may sound like an obvious mistake now, but we "devolved" into this double-sale method over time and it hurt us. As we became aware, it was clear that we needed to combine the two and sell system renovations at the same time as equipment replacement. This provides one clean message of comfort and efficiency that is much easier for customers to understand. Our closing rates climbed accordingly.

With these realities and changes affecting our market, we are constantly forced to improve how we sell to maintain our growth and profitability.

SOLUTIONS NEEDED, WANTED, AND DELIVERED

As we became better at delivering solutions, the cost of the job increased. We quickly recognized delivering what we promised was no longer optional. Now, with our customer's input, we develop a scope of work that includes equipment replacement and system renovation.

When we help our customers understand a problem, they completely expect it to be fixed. If you charge more, you must deliver. This has been one of the primary drivers of our culture here at Hyde's. We have become completely accountable to our customer to test at the completion of a job and verify the results of our work. This is who we are, and our customers believe in us.

As we move forward, one of our goals is to continually build a better sales approach that nurtures our culture and builds better long-term relationships with customers. 

Michael Hyde Presented at NCI Summit 2019

Summit 2019 took place April 15-18 in Orlando, FL. Michael Hyde was one



of five Performance-Based Contractors™ presenting how they incorporate High-Performance into their companies. He is general manager of Hyde's Air Conditioning, a residential retrofit and replacement contracting company from Indio, California (Palm Desert Area).

Hyde shared real-life successes and failures as his company forged a 12-Step sales process, taking their customers from testing to a full system upgrade proposal. The testing process has resulted in a profitable growth of 800% as a result.

If you missed Summit, you can read all about it online at HVACToday.com. Don't forget to mark your calendars for 2020 when NCI Summit returns to Scottsdale, AZ. The dates are **April 6th - 8th at the We-Ko-Pa Resort**. We will provide more information in the next few months.



A Content Marketing Primer for High-Performance HVAC Contractors

Think you don't need content marketing? Think it's too expensive and there is no return on investment? Don't even know what it is? Think again!

At its heart, content marketing is about teaching – sharing your expertise. It's about educating your prospects and customers about how you can solve their problems. Sometimes they don't even know they have a problem! You're the perfect person to teach them why they might need something your company offers.

Content marketing is not advertising. And it isn't just something you "do" sporadically. It is a long-term strategy where you use valuable, relevant content to build relationships with people so that if/when they do have a buying need (or

people to your website to learn more

- **Generate leads**
- **Result in sales**, repeat business, word-of-mouth referrals, and customers for life.

According to Content Marketing Institute's (CMI) *B2C Content Marketing 2019 – Benchmarks, Budgets and Trends* (nci-link.com/CMISTudy), 79% of companies who have been using content marketing for at least one year say it has successfully enabled them to create brand awareness. Slightly more than half (52%) say it has generated sales/revenue.

If you think content marketing isn't for contractors, think again. One of my favorite examples is Marcus Sheridan (also known as The Sales Lion), now a highly sought-after international speaker and author of the content marketing book, *The Ask, You Answer*.

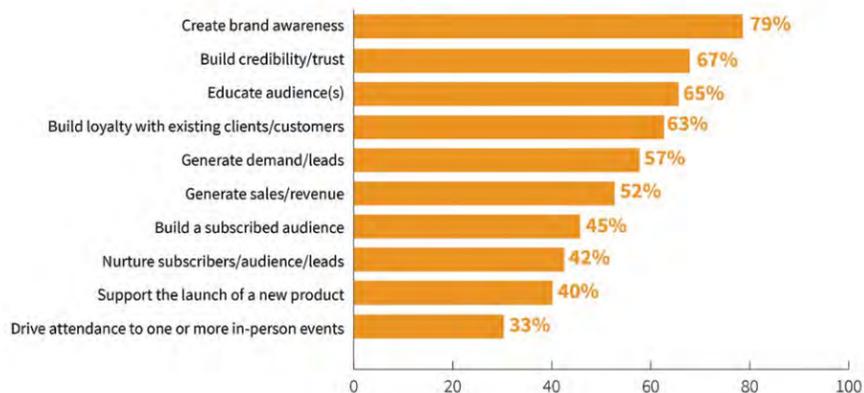
According to Marcus' website (marcussheridan.com/):

"Marcus' story didn't begin on the stage. It started with a business created and run out of the back of a beat-up pickup truck. Marcus' experience of saving his company, River Pools and Spas, from the economic collapse of 2008 has been featured in multiple books, publications, and university case studies. From its humble beginnings as a three-man firm to one of the largest manufacturers and installers in the country, River Pools and Spas has the most visited pool website in the world, with over 750,000 hits a month."

How did he save his company all those years ago? He began by sincerely answering questions about pools – and the rest is history! Marcus



Goals B2C Marketers Have Achieved by Using Content Marketing Successfully in Last 12 Months



Note: 1% said none of the above.
Base: B2C content marketers. Aided list; multiple responses permitted.
B2C Content Marketing 2019: Benchmarks, Budgets, and Trends—Content Marketing Institute/MarketingProfs

someone else they know does) they will think of your company.

Done right, content marketing can:

- **Build awareness** of your company – drives

wasn't focused on promoting his products and services – he was focused on helping people by educating them about pools and spas!

As High-Performance HVAC contractors, don't you want to do the same thing for your business?

HOW TO GET STARTED

In a nutshell, here are the steps involved with content marketing:

Assess your current branding, messaging, and existing "content assets" (website, social media sites, blog, e-newsletter, videos, case studies, etc.).

Clearly define your existing audience and describe them in written "buyer personas." Who are they? What are their pain points? What motivates them? What expertise of yours do they seek? Where are they in the "buyer's

journey" – are they just trying to learn, or are they ready to buy?

Also think about any potential audiences you want to attract. Where do those audiences congregate online? How can you get your content in front of them?

Develop a written content marketing strategy. This doesn't have to be overly complicated or written in stone. It will serve as your guiding document, but it can be flexible, so you can change it as your goals change and/or you learn what's working and what isn't.

Focus on the initiatives listed in your content marketing strategy – do you need to make sure your website content is optimized? Do you need to develop new, informative blog posts (or even get your blog up and run-

ning)? Do you need to optimize your website for mobile?

Do you want to create and regularly send out an e-newsletter? Or maybe you want to increase your presence on Facebook, YouTube, or another social media platform.

Develop an editorial and/or social media calendar. Identify the topics you want to talk about throughout the year. You can align them to the seasons, holidays, news events, etc. It can be difficult and/or too time-consuming to manage multiple social media platforms successfully, so pick one or two on which to focus your efforts.

Create, distribute, and measure the content. Your content marketing strategy should define the types of content you want to create over the next 12 months, why, and how.



Your plan might look like this:

■ We are going to create four, three-minute videos this year and release them on March 1, June 1, September 1, and December 1. The first one will be about A, the second one about B, the third one about C, and the fourth one about D.

■ The intended audience for these videos is our Buyer Persona “Eddie.” Eddie is someone who feels uncomfortable with the temperature and air quality in his home. He is at the “top of the buyer’s funnel,” meaning he’s just exploring his problem.

■ To drive viewers to these videos, we will promote them by 1) writing about them in a blog post, 2) mentioning them in our monthly e-newsletter, 3) talking about them at the upcoming local Home Expo Event, where we exhibit, and 4) posting them on Facebook.

■ Our goal for the videos is to create brand awareness and educate prospects. We want to generate at least 50 views on each video within one year, drive at least 20% of those to our website for more information, and convert at least 10% into email subscribers (i.e., get at least 10% to sign up for our e-newsletter).

Or this:

■ We are going to have someone write an ebook for us this year to post at our website. The ebook will be titled, “10 Ways To Improve the Comfort in Your Home TODAY.” The intended audience is Buyer Persona “Sharon,” who is “further down the buying funnel,” actively researching options to solve her problem.

■ Among the several ways we plan to drive personas like Sharon to our website to access this educational content, we will include a call-to-

action in our videos that says, “to learn more, visit www.OURWEBSITE.com.” That URL will link to a landing page where the ebook is available. We will ask people for their email address in order to download the informative ebook (this is also known as “creating a gated content asset and putting it behind a registration form in order to collect leads”).

■ Our goal is to generate at least 100 downloads/email addresses in 12 months via this initiative, and eventually convert 10% into sales.

Note how both examples above are strategic. We know our goals and have clear directions for getting started on achieving them. We also have an idea of how we want to measure success.

We can always tweak/improve the strategy as we go.

OTHER STRATEGIES

While these examples are content-specific, you might have other goals, such as:

▼ Hiring someone to ensure we use the right search engine optimization (SEO) words on our website and in our content. Properly optimized content shows up higher in search results so it can be found more quickly/easily. This is known as “organic” search – search results that you don’t pay for, but rather rely on. Properly optimized content based on certain keywords and search terms your audience uses to find information. You can also pay for search engine marketing or SEM services, also known as pay-per-click, to get your content to appear higher up in search results.

▼ Making sure all content includes a specific call-to-action (e.g., to learn more, download our ebook on how to

achieve comfort in your home today)

▼ Requiring the staff person or freelancer who writes our content to spend at least one day per quarter with our sales team, so he/she can further develop a realistic understanding of what prospects want and need.

▼ Delivering content consistently (on a regular basis) to keep our message top-of-mind.

▼ Grow the number of subscribers to our e-newsletter; get on a regular schedule of sending out our e-newsletter (perhaps once a month). Keep our content brief – link to a few informative resources on our website and maybe those on our suppliers’ websites (in keeping with our goal of being helpful).

DON'T GET OVERWHELMED

There are many areas of content marketing – strategy, content development, distribution, management, and measurement. The main thing is to **NOT** become overwhelmed and/or think “it’s too expensive.” You can start small and grow from there – but you have to be committed; it takes time to see results (it’s been estimated that results can take up to 18 months to be realized).

Depending on your budget, perhaps you can hire a recent marketing graduate to get your content marketing off the ground (content marketing needs a leader/project manager – as I mentioned in the beginning of this article. It’s not something someone on your existing staff can just “do on occasion”).

If you have a bigger budget, you may consider retaining the services of a content marketing consultant or agency.

“Sounds good, but how do you measure all of this – will we see a return on

investment?” you may be asking.

Measuring success will depend on your unique goals for what you want to achieve and how well you execute ... an intelligent strategy, quality content, consistency, delivering the right content to the right people at the right time, your competition and market, how your staff treat customers, online reviews about your company (your reputation) – all of these factors and more play a role.

You may find that a piece of content that took a lot of time and money to create ends up providing the most long-term value in terms of sales generated over time. You may find that what you thought customers would love is a flop. You might see something you didn’t expect to generate a lot of

results – say a cheap and simple giveaway over Facebook -- explode to create 200 new Facebook followers.

There are many ways to measure content performance (including many technology tools), but you can keep it as simple as an Excel spreadsheet. If you’re looking for a basic primer on how to use something like Google Analytics, check out *How to Use the Most Helpful Reports in Google Analytics* (ncilink.com/GoogleReports).

CMI has many resources for beginner, intermediate, and advanced-level marketers. Check out one of them: *What Is Content Marketing* (ncilink.com/WhatIsContentMktg) for more information.

There is an informative blog, white papers, ebooks, training, webinars,

research reports, and our annual **Content Marketing World** (contentmarketingworld.com) event held every September in Cleveland.

At CMI, we’re passionate about content marketing because it works – and we have hundreds of examples and stories at our website to prove it! 



Lisa Beets is the research director at Content Marketing Institute (CMI). She has been with CMI since its inception in 2010. Lisa has edited six books about content marketing including the seminal titles *Get Content, Get Customers* by Joe Pulizzi and Newt Barret and *Managing Content Marketing* by Robert Rose and Joe Pulizzi. Lisa is a former managing editor of *Contracting Business Magazine* and has written extensively on the HVAC industry. Follow her on Twitter @LisaBeets.



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The ABCs of High-Performance HVAC Contracting: PART 10

Generate Leads with Little or No Competition

Imagine if you had the option to create your ideal lead. What would it look like? Would it be a qualified prospect who is prepared and ready to do business with you? Would you want to be the first company in the home, and preferably the only contractor called in?

Would you want the customer to be well educated about their comfort system and why it isn't making their home as comfortable, healthy, and energy efficient as possible?

What if the customer was keenly aware you might be the only contractor with the solution to their problem. What if the lead was generated by your own technician? What would that lead be worth to you: \$200? \$500? More?

NO COST LEADS

With High-Performance Service and Maintenance you can generate leads like this every day with little or no cost. In some cases, you can get paid to go on those calls. Your service

department is the key to generating these ideal leads. With the right tools and training your techs can become lead-generating machines, and your customers will love you for it.

With just a few measurements, your service and maintenance technicians can uncover long-standing problems that affect comfort, health, energy use, even safety.

By measuring Total External Static Pressure (TESP) at the equipment, along with a couple of other pressure drops, they can reveal high static pressure issues, airflow problems, restricted returns, incorrect refrigerant charge, leaky ducts, and more.

By performing combustion, draft, and carbon monoxide (CO) testing, they can unveil serious safety issues. These can include venting and combustion air deficiencies, even mechanical problems.

LEADS THROUGH DIAGNOSTICS

There are a few different ways Performance-Based Contractors across North America are generating leads through service. The simplest way is to have your tech spend a few extra minutes reviewing their findings with the customer, and offering to schedule a diagnostic visit. Technicians can also leave behind literature on what can be done to improve their system's performance.

The visit can be followed by a letter explaining the benefits of a more in-depth diagnostic, inviting the customer to schedule one. Then follow up the letter with a phone call.

If you have "Selling Techs," they could of-



fer a "deeper" diagnostic right then and there, then call the office to have another tech grab their next appointment, and continue with the *Performance-Based Selling Process* outlined in Part 9 of this series (ncilink.com/ABCs-9).

Depending on the time of year, backlog of work, etc., you can offer a more thorough analysis of their system at a price ranging from free to several hundred dollars. Done right, this in-depth testing and documentation is worth every penny.

Another approach is to simply have your technician collect the data mentioned above and take it back to the office. Your team can then generate a follow-up letter and survey, with an offer to perform further testing.

Depending on the situation and time of year, your comfort advisor might want to follow up right away with a phone call to the customer.

THE FOLLOW-UP

There are a number of ways to follow up. A popular low-pressure approach is to call and explain that you were reviewing the service ticket from their visit and noticed the system's pressures seem higher than

look – just to be sure there won't be long-term consequences of running the system that way.

Contractors who use this approach have reported tremendous success with closing rates over 80% - usually with no competition.

One High-Performance Contractor in South Carolina has been using this approach for years with phenomenal success.

"When I follow up a service ticket showing high statics, 90% of the time the customer welcomes a visit from me," he says.

"So far I've closed sales ranging from a simple air upgrade to a com-

they should be.

You could ask some leading comfort questions, and once the customer understands there may be an issue, you can offer to come out to take a closer



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

Part 9: Six Steps of High-Performance Selling. ncilink.com/ABCs-9

plete change out and total duct make-over at very nice margins.

“In all the years I’ve been doing this, I’ve never seen an approach that generates replacement and renovation business out of thin air like this one does,” he adds.

KEEP IT SIMPLE

When your technician is attempting to share his or her findings with the homeowner, he or she needs to keep it as simple as possible, using layman terms and analogies the homeowner can relate to.

Don’t confuse people with technical terms like CFM, inches of water column, or BTUH. When discussing static pressure compare it to blood pressure. Everyone knows high blood pressure is not a good thing.

You can also increase your credibility significantly with third-party leave behinds, like NCI’s *Home Comfort Reports* series of brochures and pamphlets, and by using software like ComfortMaxx™, or NCI’s free AirMaxx Lite App.

The smart device app is available

at no cost in both the Apple App store (ncilink.com/AML1A) and Google Store (ncilink.com/AML1D) for Android devices. It allows you to show the homeowner key indicators of how their system is performing using easy-to-understand graphics right on your smart phone.

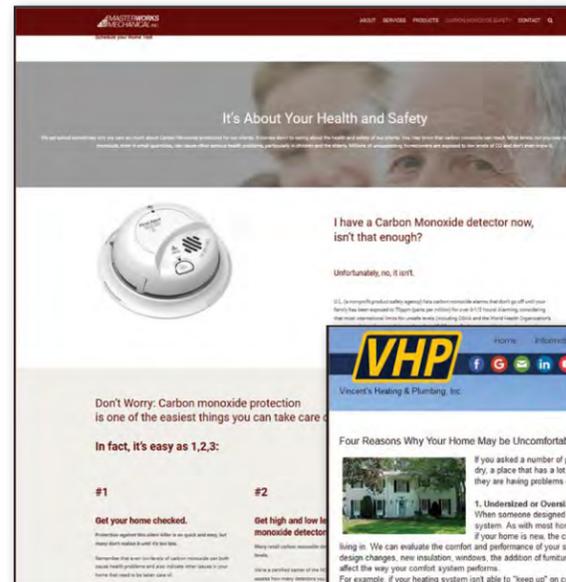
KEEP IT POSITIVE

When discussing your findings with the homeowner, it’s important to keep the conversation positive.

No one wants to hear they made a bad buying decision, perhaps when they bought the home, or last replaced their equipment.

Telling them this is one of the worst systems you’ve seen this year, their statics are through the roof, and it’s a wonder the equipment hasn’t had a complete meltdown by now is not a good approach. Not too many people would respond well to that.

In fact, most would look at it as a scare tactic, and become highly suspicious of your claims and worse,



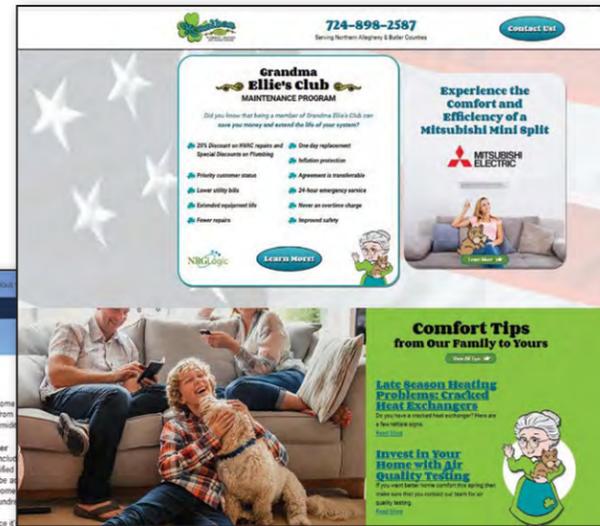
your motives.

A better approach to keep customers engaged is to share that you found some pressures and other readings in their system to be outside of manufacturer’s specifications. Reassure them that, based on the age of the home and HVAC equipment, their system is fairly typical.

Be sure to reinforce the fact that the technology, tools, and training available today were not readily available 10 or 15 years ago. In fact, many of the testing tools used today have only become available recently.

Use analogies like air bags on cars and laser surgery, both of which didn’t exist until the early eighties. In all industries technology is constantly evolving and improving.

Next mention that while their system is typical, the symptoms they’ve been experiencing can be significantly improved. The key is to gently bring the customer up-to-speed on what improvements can be made while demonstrating that your company is the right choice to do the work.



Here are just a few examples of Performance-Based HVAC Contractor websites containing good consumer content.

BALANCE YOUR MARKETING

While you can’t rely solely on sales generated from service and maintenance, these visits can be your best source of high-quality leads with high closing rates.

It’s important, of course, that you balance your marketing with multiple approaches including direct mail, newsletters, email, and especially your website.

Be sure to make your site as content-rich as possible. Not only will this improve your standing with search engines, you will quickly become the go-to resource for information when people are having home comfort issues,

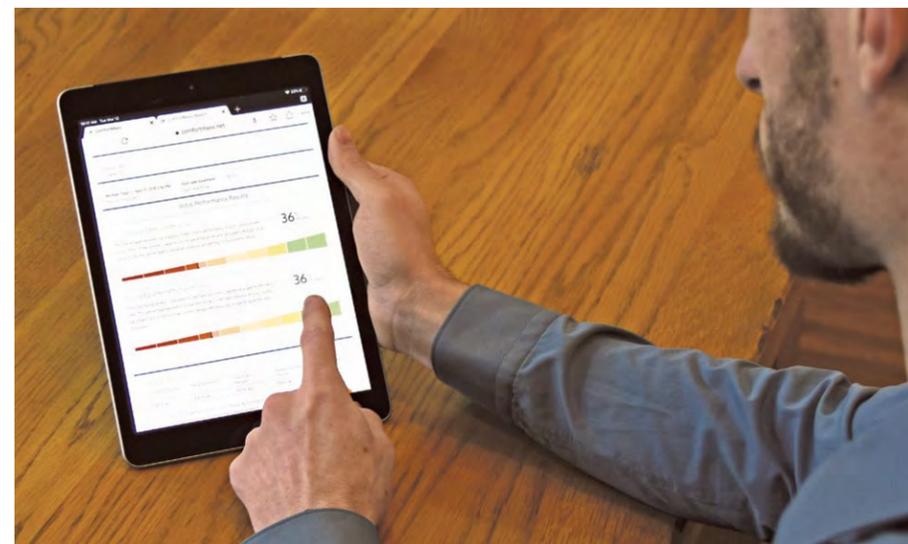
or are doing research before replacing their systems.

Education is key in today’s fast-paced environment. More consumers than ever before are using the internet to become well informed before they pick up the phone or click on a website to schedule an appointment.

In Part 11 of this series we will explore how you can get started on your path to High-Performance without overwhelming your team or disrupting your existing business model. **NCI**



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



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Start Your Engines! Trailblazer Coaching Is Off to the Races!

Ladies and gentlemen – it’s back, better than before because it was designed and tested by HVAC contractors who participated in the inaugural program launched last year. High-Performance Trailblazer Coaching 2019-2020 launched on May 1st.

Trailblazer Coaching is the result of requests from many NCI Summit attendees who wished Summit was ongoing so they remain motivated to implement what they learned after they got home. We listened and now bring you this service.

For as little as \$35 per month, you can participate in 12 monthly High-Performance Trailblazer Coaching sessions with fellow HVAC contractors from across the country!

HERE’S HOW IT WORKS

Trailblazing Coaching sessions are held on the first Friday of every month at 9 AM Eastern time. Each session is a highly interactive 45-minute web meeting, led by NCI coaches.

Your first session includes a 30,000-foot overview of the entire coaching plan where you can ask questions and provide input on the areas where you might need the most help.

In each of the next 10 sessions, your coaches will lead the group in a discussion on two of the steps on the Trailblazer Roadmap. During the final session, just before Summit 2020, you will review where you’ve been, discuss successes and failures along the way, and map out your game plan for the next 12 months.

The map shown in the image (click to enlarge) illustrates the 20 areas that will be covered in the online coaching

Blaze Your Trail to High-Performance
Your Step-by-Step Map to Implementation

- Determine your High-Performance products & services**
Define the products and services that you will offer to improve the safety, health, comfort and efficiency of your customer's HVAC systems.
- Choose a Champion**
Determine who will lead and keep everyone focused on achieving the high-performance HVAC goal.
- Establish processes and roles**
Adjust existing processes and procedures to include high-performance principles.
- Measure & reward team performance**
To support a consistent testing culture leading to high-performance solutions, recognize and reward your team.
- Get your entire team on board**
Explain "why" a high-performance culture is much better than "status quo".
- Define mandatory measurements**
Clearly define which measurements are mandatory on every service call, maintenance call, sales call, and installation.
- Purchase proper test instruments**
Identify the best test instruments to get the job done that fit your budget.
- Select collateral materials**
Review NCI's document library and select the pieces that support your high-performance initiative.
- Update your information systems**
Modify existing paperwork or software to record HVAC system vital signs and high-performance recommendations.
- Develop high-performance skillset**
Build your team's confidence in their high-performance testing and communication skills.
- Practice, practice, practice**
Practice testing and simplified communication skills in non-threatening real-life situations.
- Price your products & services**
Develop an upfront pricing model to support the high-performance products and services your team will offer.
- Collect performance measurements**
Measure and record HVAC system vital-signs at every opportunity.
- Communicate performance evaluation**
Connect potential safety, health, comfort, and efficiency concerns to poor system performance measurements.
- Offer high-performance products & services**
Provide appropriate recommendations based on performance measurements and customer priorities.
- Create scope of work**
Design a solution that fits the customer's need and priorities.
- Hand-off project to installation**
Communicate all aspects of the project to the installation team.
- Perform high-performance services**
Complete scope of work to correct safety, health, comfort, and energy efficiency problems.
- Test-out to verify results**
Ensure that the promises made were delivered.
- Maintain system performance**
Continue collecting system performance measurements during your maintenance agreement visits.

sessions. Each area is a key element to the successful implementation of High-Performance Contracting.

Breaking the process down into these bite-size steps will help ensure your success without overwhelming you and your team.

So, who are the coaches?



David Holt, Director of Business Training and Coaching, National Comfort Institute



David Richardson, Curriculum Developer and Instructor, National Comfort Institute.

There is special pricing for members like you, who can also apply their NCI bucks toward the cost.

Go to ncilink.com/TrailBlazeReg to register today.

Don't waste another minute!!!

Did You Know ...

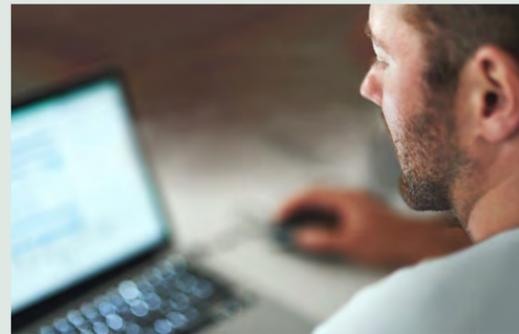
... that your membership gives you access to NCI's extensive Online University? This is a virtual Performance-Based training facility that is available to you online, 24/7/365. It provides advanced technical courses, business management courses, as well as courses focused on customer service training.

NCI also has a series of webinars that are recorded and available. From owners and managers to office staff and field techs, you'll find the training you need for every type of employee – at all learning levels.

Some benefits of this library of courses:

- Reinforces in-person training, and can help prepare for in-person training
- Enables you to train all of your employees - affordably
- Gets your entire staff on the same page
- Saves travel expenses
- Supports your Performance-Based Contracting™ culture
- Numerous courses qualify for NATE CEUs

Just go to ncilink.com/OnlineU to see what is available, and get started today.



“What Do You Mean We’re Low on Airflow?”

— **Matthew Michel, Elite Balance, Suamico, WI**

After installing a new exhaust fan on an existing duct, this technician discovered some low airflow issues. After some investigation, he knew what was happening. As he stated in his entry: “The picture is worth a thousand words!”

Matthew Michel from Elite Balance is the May 2019 winner in the “Bad” category of our Photo-of-the-Month contest, as voted on by the subscribers to the High-Performance HVAC Today magazine and visitors to the website. He will receive a \$50 gift card.

You can too – submissions are always welcome. If you’d like to submit a photo for consideration in our Photo-of-the-Month contest, go to ncilink.com/POMSubmit and fill out the information as requested.

THE JUNE CONTEST OPENS ON MAY 13, 2019.

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

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Summit 2019 Exceeded Our Expectations!



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

Summit 2019 was a resounding success this past April with a record 20% increase over last year's record attendance! Be sure to read all about it in our special Post-Summit feature on [page 22](#).

Contractors attending this year showed a bond and camaraderie that I've rarely seen at an industry event. Several of our industry partners shared the same sentiment with me. They commented they had never witnessed this spirit of sharing and fellowship in another industry conference.

What made it even more amazing for me was this feeling extended beyond the regulars who have been coming for the past 5, 10, or 15 years.

This year we had a record fifty first-timers! As I talked to many of the them, a common thread emerged: They said how welcome they felt, not just by staff, but by their fellow contractors.

They remarked how incredible it was that everyone was so willing to share their experiences and knowledge about their PBC journey.

A special shout-out to the five amazing contractors who co-lead the breakout workshops

with our instructors and coaches – your contributions to Summit were immeasurable!

We also introduced two new Summit features: a fun game show called "Reach For The Summit," and the terrific "Ask the Coaches" session with a panel of

five top industry coaches. The most popular discussion revolved around online reputation management. Be sure to read Mike Weil's "Today's Word" on this topic on [page 7](#).

This year we were thrilled to have a record number of partners and event sponsors. In total, 20 exhibitors were there to share information about their products and services in a tabletop program in our General Session room.

A special thanks to our 10 partner sponsors who helped make Summit possible. Speaking of which, a big thanks to our Platinum sponsor, Goodman Manufacturing who hosted an incredible Opening Reception complete with a Jimmy Buffet tribute band!

Because of their great contributions to Summit, in addition to being one of NCI's biggest supporters of training across North America, Goodman received our 2019 Partner of The Year Award.

During his acceptance of the Award, Goodman President, Satoru Akama made a simple, yet profound comment about the HVAC industry: "We assemble products from steel, aluminum, and copper, but you, the contractors, are the ones who bring these products to life."

What an open, honest, and unfiltered statement from a manufacturer! From the stage I could see almost everyone's mouth in the room drop in unison. Obviously I wasn't the only one who was floored by this amazing admission and compliment. It was truly a historical moment.

So much more magic occurred at Summit, from our incredible 2019 Contractor Award winners, to what were sure to become lifetime friendships forming before our very eyes.

To keep the Summit experience and spirit going all year-round, we are once again introducing our Trailblazer Coaching program which starts Friday May 3rd 9 am EDT, and will continue the first Friday of every month until Summit 2020.

Those who attended Summit this year qualify for a special Summit rate. [Click Here](#) – or go to ncilink.com/trailblazer to learn more and enroll in the coaching program.

Preparations for our next Summit are under way. Mark your calendars: we will be in Scottsdale, AZ, April 5-9, 2020 at the We-Ko-Pa Resort, which features a world-class golf course and casino.

We've already begun working on next year's program based on your recommendations. Registration info and a hotel reservation link will be available at GoToSummit.com very soon.

"WE ASSEMBLE PRODUCTS FROM STEEL, ALUMINUM, AND COPPER, BUT YOU, THE CONTRACTORS, ARE THE ONES WHO BRING THEM TO LIFE."

- SATORU AKAMA, PRESIDENT, GOODMAN

High-Performance Trailblazer Coaching

Keep the momentum going all year long!

NCI's 2019/2020 High-Performance Trailblazer Coaching Program

NCI is offering a valuable implementation coaching program to keep your company on the path to success. For as little as \$35 a month, you can participate in 12 monthly High-Performance Trailblazer Coaching sessions with fellow HVAC contractors from across the country.

This program was designed and tested by contractors who participated in the inaugural program launched at Summit 2018. Each session is a highly interactive 45-minute web meeting, led by NCI coaches. Your first session includes a 40,000 foot overview of the entire coaching plan where you can ask questions and provide input on the areas you might need the most help with.

In each of the next 10 sessions your coaches will lead the group in a discussion on two of the steps on the Trailblazer Roadmap below.

During the final session, just before Summit 2020, you will review where you've been, discuss successes and failures along the way, and map out your game plan for the next 12 months.

Here's what the original Trailblazers say about the program:



Additional Bonuses:

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- Coaching Session Recordings
- And much more...



Download your Trailblazer Roadmap

This map illustrates the 20 areas that will be covered in the online coaching sessions. Breaking the process down into these bite-size steps will help insure your success without overwhelming you and your team. <http://ncilink.com/roadmap>



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