

The Ultimate HVAC Contracting Success Manual



Increase Sales & Boost Profits

BY WENDELL BEDELL, FOUNDER OF



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1. **Price your services right!**
2. **Generate sales leads right!**
3. **Sell your services right!**
4. **Deliver your services right!**
5. **Right size your staff right!**
6. **Motivate your staff right!**
7. **Keep your business on the right track!**

About The Expert

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Wendell Bedell is an entrepreneur, industry speaker, author and consultant to HVAC residential and commercial service organizations who want to implement growth processes within their businesses. He teaches from personal experience. Over an 26 year span, while working in collaboration with other award winning HVAC residential and commercial business experts, he has self-published 9 HVAC business education and sales training books, 52+ seminars and on-line webinars, authored two websites that attract thousands of visitors each month, and has created 6 complete

Ready-Built retail residential HVAC and commercial service HVAC/R department implementation tracks, as well as, industry award winning residential service and installation flat rate price books, commercial service agreement pricing tools and consumer friendly HVAC websites that are sold through the www.GrowMyHVAC.com website.

He has won two consecutive national HVAC Most Valuable Performer Awards and several Top Managers Awards marketing and selling energy services, design-build services, and IAQ and electronic control automation systems.

He founded Building Services Institute in 1998 as a premier HVAC training organization, and holds a Masters of Business Administration in Marketing, from the University of Hartford (1990), a B.S. in Business Management, Westfield State College (1987), and an A.S. in Industrial Electronics, New Hampshire Technical College (1981).

You may obtain on www.GrowMyHVAC.com website FREE e-books and get access to *Focus on Profits webinar workshop series*, podcasts, videos and articles to help you get successful TODAY in HVAC contracting!

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Chapter #1 – You Too can Be Living the American Dream

“Education is the gateway to achieving the American Dream, and reading is the most fundamental of skills.” ~ Bill Frist

To work for yourself, to be your own boss, to run your own HVAC business – for many these phrases describe the American dream. Becoming a successful HVAC business owner, however, is not an easy task. It requires skill, motivation, hard work, and good luck. It also requires HVAC business operating information in large measure. The HVAC business owner stands on the brink of a fantastic future with a thousand HVAC related business questions that need answers.

The Ultimate HVAC Contractor Success Manual was compiled by nationally recognized HVAC business industry experts and national award winning users of proven business processes used at such successful residential and commercial/industrial franchisers and marketing groups, as well as from contributions from our successful award winning clients.

It is also based on the 3 business objectives of our GrowMyHVAC.com Business Fitness Education Center programs, which are:

1. To take the “best from the industries best practices” and assemble it in an on-line step-by-step implementation track – delivered right to you and your staffs’ desktops - available 24/7.
2. To make it easy to implement change for our enrolled HVAC contractor business owners to accelerate revenues and sustain profitability.
3. To make it affordable for our enrollees by helping them avoid having to pay the huge fees and travel time trying to integrate with these other industry groups.

This Success Manual cites direct references to our 6 GrowMyHVAC.com department tracks on how to identify where profit improvement potential exists in your business

and how to correct inefficiencies within your business process, all of which will be useful in the process of becoming a successful independent HVAC business leader.

Most HVAC business owners don't have a formal business plan. Why? They don't need one. What they really need is a general direction for the upcoming year. Depending on your business's stage of growth, all you need is a Business Improvement Action Plan that consists of enhancing each department's lead generating, strengthening the quality of services delivered, improving operational efficiencies, adding the right amount of people to match historical revenues, and in some cases include adding new services or acquiring another business.

To fill this need, and as a courtesy to the HVAC industry, we provide to all HVAC contractors these FREE services:

- The Ultimate HVAC Contracting Success Manual.
- On-line Business Improvement Plan that will identify profit gain opportunities and verification if a need for our program exists.
- A FREE no-obligation 1-hour telephone or show & tell GoToMeeting consultation to help identify ways your business can quickly advance towards the 3 key HVAC business success objectives.

The 3-key HVAC business success objectives

HVAC business owners are just like all other business owners. They want to know how to make more money, cut costs of doing business, avoid taxes, avoid expensive lawsuits, find new opportunities to do business and free up more personal time for themselves and family. Beyond this are the specific details and solutions to their unique sets of HVAC business issues and problems.

Keep in mind that 95% of what it takes to make change in your business is teaching your people the step-by-step business processes and forms. Only 5% of what it takes to make change in your business involves your people management skills and time. However, we spend the bulk of our Ready-Built HVAC program's support is providing FREE consulting time in helping your people to implement the proven processes.

The key advantage of our online Ready-Built HVAC Contracting programs is saving you 95% of the time required to make change. Our training center located at www.GrowMyHVAC.com provides you with complete Ready-Built HVAC department tools, processes and step-by-step guidance, as well as, a best practice website option to help you reach the 3-key success objectives:

1. **We help you make the phone ring more and consistently throughout the year by:**
 - a. Providing and hosting a Best-Practice 27-page consumer friendly website to professional and quickly respond to leads for request for repair, tune-ups and system fixes, upgrades and replacements.

Websites are the single most powerful but lowest cost means to provide 100% of your market your business card. Why a website is even needed today is that 9 out of 10 consumers go to internet to buy our services.

- b. Providing you seasonally timed proven lead generation campaigns for tune-up, system enhancements, upgrades and replacement campaigns.

2. We help you make more money by increasing profitability and customer satisfaction by:

- a. Increasing your average service and replacement ticket by 35%-65% by improving your service and sales call handling skills to uncover complete need sets, establish relationships, verify fit with your offerings, create urgency, craft and communicate solutions, negotiate a plan of attack to win business, gain commitment, close deals and happily getting paid by our customers.
- b. Improving technician perception of your service/work delivery quality and productivity by using professional call handling procedures and forms, as well as performance based pay and incentive programs.
- c. Improving through written standards your surveying, estimating, pricing, invoicing, and proposal writing to minimize risk, liabilities and meeting your customer work delivery and financial transaction expectations.
- d. Improving through written standards your operating performance by using financial operating and individual daily labor productivity performance benchmarks, labor and expense forecasting, along with simple rules based management to maximize company profitability and business value.
- e. Improving individual job performance through online individual job training and LIVE right-at-your-desktop process and forms implementation support.

3. We help you make more FREE time for you and your family by helping you manage your business's processes – not people by:

- a. Improving your business delivery via consistent job training or retraining on our proven written step-by-step pricing, marketing, selling, work delivery, labor management, tasking procedures and forms for all of your HVAC work categories.

b. Improving labor motivation through:

- i.** Consistent customer focused service and sales call handling labor tasking process and forms.
- ii.** Consistent profitability focused work delivery labor tasking processes and forms.
- iii.** Published Employee Handbook
- iv.** Performance based job descriptions
- v.** Objective individual performance evaluations
- vi.** Individual daily labor productivity benchmarking
- vii.** Performance based pay incentive programs.

Do you know the value of your business?

The first question that you should be asking is what is the value of my HVAC business, and how can it be increased. Why? The value of your business is used by bankers to justify credit lines for business expansion and/or for meeting cash flow needs. It is important to understand that the value of your HVAC business will be based at the time you need money from the bank or at the time of the sale of your business. It is also based on the combined value of your service and installation/project business's net profits and the value of the businesses physical assets such as facilities, land, equipment, tools and vehicles.

It is very important to keep in mind that not all net profits are equal in market value. The net profit from quoted project work is typically worth about 1 ½ times the annual net profit amount. This is typically referred to a “good will” since this work is sold and the assumption is that the business should net this amount again in the future.

The net profit from service agreements which are also referred to by the banking industry as “renewable revenue streams” and the associated demand service net profits are added together and typically worth up to 6 times the annual net profit amount. This means that if you were to find ways to increase your service business revenues by a mere 5%, it would result in increasing your service business value by 6 times that or 30%.

The business's physical assets are often sold separately at market value rates. This gives the business owner the flexibility to either sell to another HVAC business that does not need the physical assets or to people interested in acquiring the entire business.

You can find out what your business is worth and what it could be worth if you obtain the profit gains it identifies within each of your departments by completing the FREE online Business Plan at

<http://www.growmyhvac.com/webpages.asp?wpid=164>.

It's all about managing processes not people

A successful HVAC Contracting business needs committed workers who complete the required work labor tasking and procedures consistently and accurately. It also requires all key stakeholders involved in delivering work to contribute their experience, knowledge, ideas, and mistake proofing suggestions to continuously improve work methods.

Successful HVAC managers have long recognized that most employees want to do a good job and continuously seek to focus workers' tasking efforts in ways that will benefit the customers, the company, and fellow employees.

Written standard operating procedures (SOP's) and the individual job training on the procedures are used to get everyone working toward exceptional performance and success for the customers, company and co-workers.

When SOP's are used in conjunction with planned on-line education/training and regular employee performance evaluations it tends to result in an error free and motivated workforce. Huge gains in productivity and morale are derived from the positive sense of teamwork and accomplishment that arises when everyone successfully works together toward common objectives and goals.

Written SOP's are powerful tools for taking control of the quality of work tasking which can make the difference between success and failure in today's HVAC economy. In addition, SOPs act as great communication tools that contribute to better understanding and job satisfaction.

Here is a partial list of the benefits of written SOP's:

1. Gives the employee direction to do their jobs
2. Improves employee and department communication
3. Reduces employee training time
4. Reduces human error and/or missed tasking
5. Reduces company & customer business/personal risk liability
6. Improves work consistency and quality of work
7. Improves profitability and customer satisfaction
8. Provides the Company a vehicle to tune-up the business cash engine

We encourage you to take advantage and incorporate into your HVAC business our Ready-Built HVAC “best practice” written SOP’s and individual job training into your business as an excellent way for your HVAC managers, support staff, and field personnel to cooperate for the good of all customers, employees, and the company’s benefit.

“We were a HVAC Franchise 3 years ago. We just couldn’t justify the huge tax on our business or the loss of control of our company’s accounting system to others. Unfortunately, this resulted in a slow decline in our profitability. We thank you for affordably getting us back on track.”

John Fulling
All American Heating Inc., CO

Using daily labor productivity benchmarking

Most companies fail to monitor and measure daily labor productivity and call handling opportunity lead conversion rates. Without measure you cannot establish individual or whole department performance benchmarks. Without benchmarks you cannot make meaningful operating improvements or maximize company revenue and profit opportunities.

Actual labor productivity performance is obtained using a debriefing checklist with your technicians and installers at the completion of each service call or at the end of each day on installations. The best part about performance benchmarks is that they help you stay on track by enabling you to ask the right business questions regarding your people and business processes. You then can **use daily benchmarks to Coach your Team** to success. As Coach, your goal is simply to drive each of your benchmarks towards increased revenues and profits.

Here are some examples for our Retail Residential Service Department’s DAILY benchmarks. They are used to compare actual to budget labor productivity performance that helps the service manager monitor his/her people and overall department operating performance:

1. Daily Number of Calls Ran:
 - Budgeted daily number of calls ran
 - Actual daily number of calls ran
 - % of budget daily number of calls ran
2. Daily Average Sale Price per Service ticket
 - Budgeted daily sale price per service ticket
 - Actual daily sales price per service ticket

- % of goal daily sales price per service ticket
3. Daily Service Revenue:
 - Budgeted daily service revenue
 - Actual daily service revenue
 - % of goal daily service revenue
 4. Daily Number of Replacement Leads:
 - Budgeted daily number of replacement leads
 - Actual daily number of replacement leads
 - % of goal of daily number of replacement leads
 5. Daily Number of Service Agreements Sold
 - Budgeted number of service agreements sold
 - Actual number of service agreements sold
 - % of goal of number of service agreements sold
 6. Daily Number of Call Backs
 - Budgeted number of call-backs
 - Actual number of call-backs
 - % of goal of number of call-backs

The top HVAC contractors are using our daily benchmarking process and forms to motivate their individual service and installation staff to higher productivity and through competition by posting their staff's labor productivity performance versus benchmarks on a Goal Board located in a common area.

“This program has taught me how to run a profitable Retail Residential HVAC business. The best part was learning how and getting the necessary business tools to do so right at my desktop. “

Randy Fly
Fly Heating & Air Conditioning

Chapter #2 – What it Takes to Run a Successful Business

“Success in business requires training and discipline and hard work.” ~ David Rockefeller.

It is the unfortunate truth that most HVAC contractors cannot afford the money to purchase a franchise, or join an expensive contractor group, or hire a private consultant, or to even continue in such programs just to get access to proven business processes. Now we do agree that marketing, selling, consulting, and flat rate price books provided by other industry trade groups offer their HVAC contractor customers' a huge competitive advantage. These HVAC contractors tend to still grow and make 12%-30% pretax even during these tough economic times.

Available GrowMyHVAC.com Resources

Fortunately, you **don't** have to go down any of these very expensive paths, spending thousands of your hard earned money hoping to be successful. **Since we leverage on-line education right at your desktop, we are able to offer our complete Ready-Built HVAC department tracks for less than a cup of coffee per day! Plus we even guarantee your success!!** See the www.GrowMyHVAC.com online training center and the proven Ready-Built HVAC department processes, forms and best practice HVAC contracting websites.

Proven 7-Step Recession-Proofing Approach

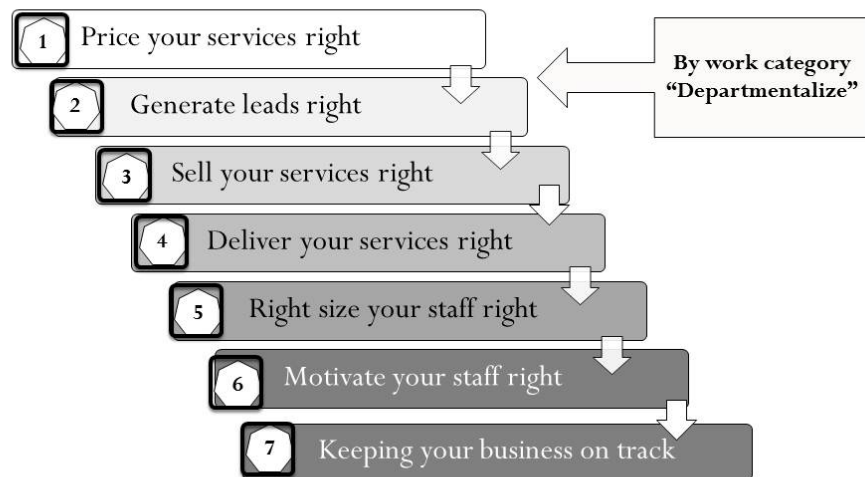
Ready-Built HVAC contractor program's using a "Plugging the Profit Leaks" approach that is built around upon a 7-Step-by-step implementation of proven best-practice operating processes, forms and pricing books/tools along with the personal implementation support to help you and your work towards developing a more sustainable business.

GrowMyHVAC.com's on-line Business Fitness Education Center is the FIRST IN THE INDUSTRY to have perfected the most cost effective step-by-step method of HVAC business change management. Each Ready-Built HVAC training program package implements Ready-Built franchise-like processes, forms, implementation support, and continued staff training to keep your residential or commercial business's cash engine tuned.

The 6 complete Ready-Built HVAC online departmental tracks, forms, and award

"For me, GrowMyHVAC.com program has provided us with a clear guide to achieve our goals, has renewed my vision for our company, and has proven that it only takes serious encouragement, proven techniques and materials, and the

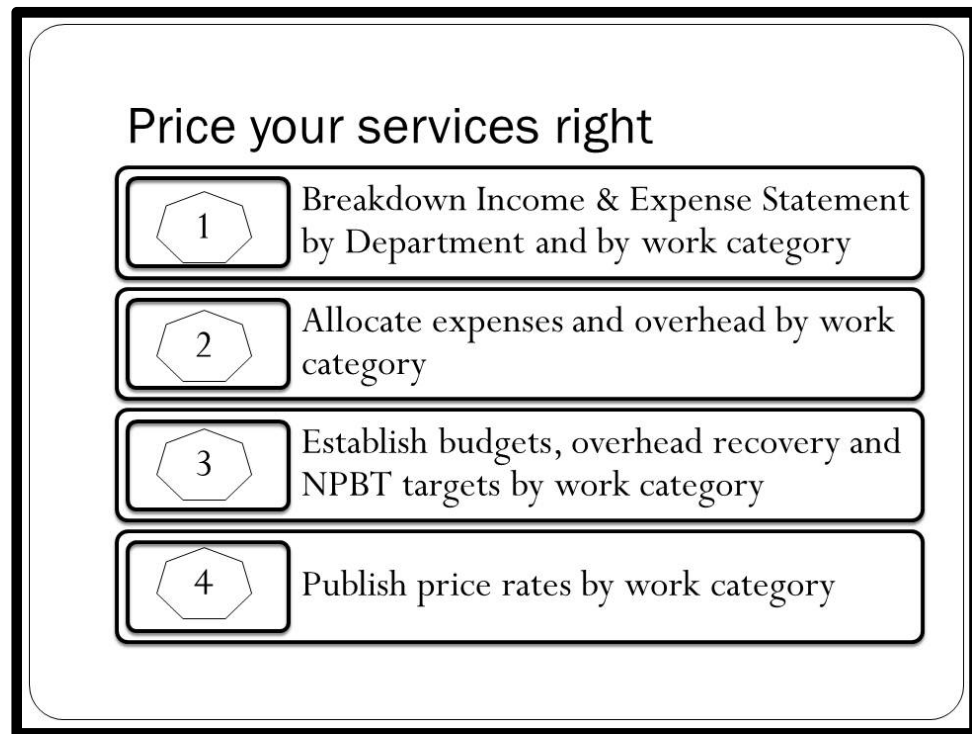
7-Step Recession-Proof approach



winning flat rate price books are fueling contractor success, even in these recessionary times.

Our clients are selecting GrowMyHVAC.com's Ready-Built HVAC department training as a strategic business partner over other nationally known franchises and membership based organizations. This is due to our program's proven track record and our ability to assist our contractor clients to quickly profitably grow their businesses. The contractor customers that are participating in the GrowMyHVAC.com program are leveraging the program's best practice processes to achieve a predictable 12-30% pretax.

Our clients have also expressed that the best aspect of our program's is that it's like having a full time general manager, sales manager, operation manager and business coach/mentor all for less than minimum wage. Our programs each also provide you with a no-risk 100% money back guaranteed growth solution.



#1 - Price your services right!

We illustrate the 4-key areas where we help you price your services right.

1. **Breakdown your Income & Expenses statement by department/ work category:** Being able to read an Income & Expense financial statement and how to break down your revenue and expenses by department and by product/service offering helps to establish accurate pricing rates and policies for your demand service, service agreement, special services, installation, and design-build work.

Available GrowMyHVAC.com Resources

- a. See our FM-STEP #1.0 Pricing for profits on-line session.
<http://www.growmyhvac.com/CourseModules.asp?CC=FM>
2. **Allocate expenses and overhead by work category:** Job related expenses are defined as the job costs in equipment, materials, parts, subs, rentals, and permits to deliver your demand service, service agreement, special services, installation, and design-build work. Overhead is defined as what it takes for people and facilities to

process your book of business. Allocating your job expenses and overheads to each work category enables you to be more competitive with your pricing.

Available GrowMyHVAC.com Resources

- b. See our FM-STEP #1.0 Pricing for profits on-line session.
<http://www.growmyhvac.com/CourseModules.asp?CC=FM>

3. **Establish budgets, overhead recovery, and net profit before taxes by work category:** Budgets are used to help you manage cash in-flows to labor and material expense outflows, as well as to track actual performance net profits by work category. You should have in place financial management and labor forecasting tools to establish your company's budget and forecasting by work category.

Available GrowMyHVAC.com Resources

- c. See our FM-STEP#6.0 BudgetPro financial Management and labor forecasting on-line session.
<http://www.growmyhvac.com/CourseModules.asp?CC=FM>

4. **Publish price rates by work category:** Using accurate if known or using our industry average expense and overhead allocations quickly makes your pricing more competitive by preventing underpricing high service overhead work and from overpricing low overhead installation/project work. These rates are then plugged into your flat rate service, installations, or quoted projects and design-build work pricing.

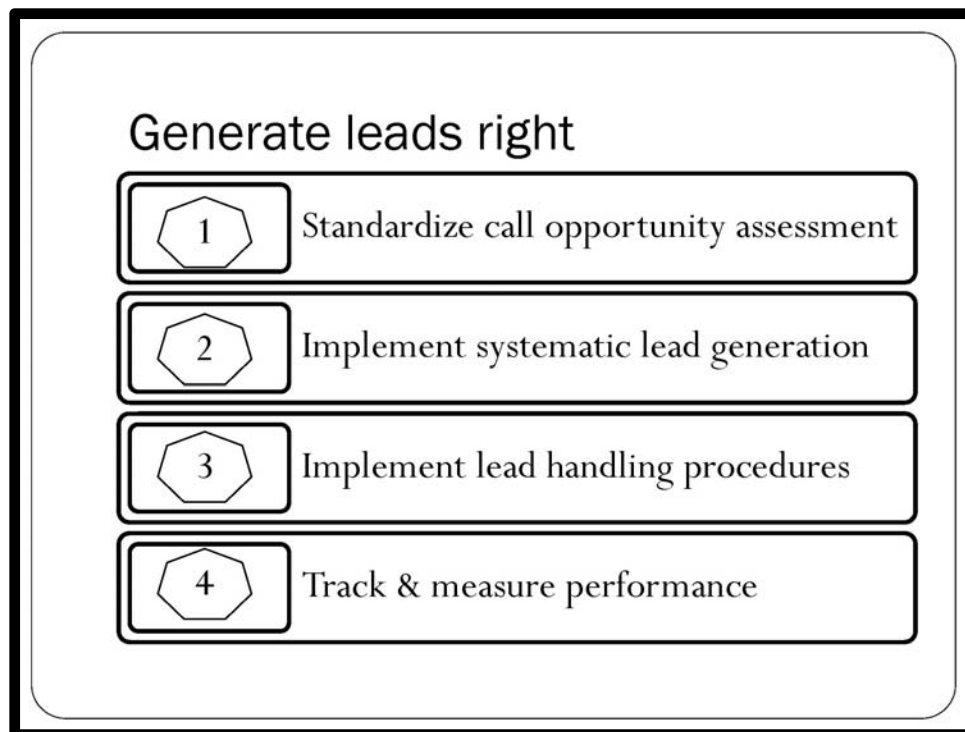
Available GrowMyHVAC.com Resources

- a. Fix-Right Service Repair Flat Rate Price Book requires a 1-page set-up form and includes industry operating default pricing & overhead rates to enable getting your repair price guide into your hands within 1 business days or less— See our RS-STEP #1.0 Fix-Right residential flat rate repair price book set-up
<http://www.growmyhvac.com/webpages.asp?wpid=112>
- b. Home Comfort Equipment Installation Flat Rate Price Book requires a 1-page set-up form, includes a presentation of who you are, what makes you different, what the regulatory approved process you will use to identify system requirements, as well as, includes an easy upsell 'Good-Better-Best-Premium' installation options by system size and for each system type. It also includes finance and energy savings tables to enable showing customer how affordable the net monthly cost of ownership really is.— See our RR-STEP #1.0 Home Comfort replacement packaged pricing book set-up.
<http://www.growmyhvac.com/webpages.asp?wpid=113>

- c. AccuPro commercial service agreement pricing program includes 100% of all commercial HVACR systems with 72 built-in pricing tables and enables users to quickly price inspection only, inspection and repair labor coverage and or full component repair labor and parts/material coverage options with up to a 5 year contract term option.— See our CS-STEP #1.0 AccuPro commercial service agreement pricing set-up.
<http://www.growmyhvac.com/webpages.asp?wpid=117>
- d. ProjectPro design-build/project pricing program is designed to create a step by step installation sequence from start to finish with option to add labor, material and quantities for each install item.— See our CP-STEP #1.0 ProjectPro retrofit/Design Build pricing program set-up.
<http://www.growmyhvac.com/webpages.asp?wpid=118>

#2 - Generate leads right!

We illustrate the 4-key areas where we help you generate your leads right.



1. **Standardize call opportunity assessment and survey forms:** Studies show that 90% of all HVAC systems are installed incorrectly and 50% have air distribution deficiencies. This means that if you go on 10 calls you should be able to find 9 installation fix opportunities and 5 ductwork fix opportunities. Unfortunately most contractors miss 65% or more in opportunities due to a lack of proper customer and system assessments on all service and sales calls.

Available GrowMyHVAC.com Resources

- a. The main objective of our standardized Professional Service and Sales Call Handling opportunity assessment and survey forms is to help you to systematically identify, make residential or commercial service customer aware and provide upfront pricing for customer options to improve their situation for:
 - i. Comfort
 - ii. Health/IAQ
 - iii. Safety - in and around unit
 - iv. Property – adding capacity to match functional use
 - v. Financial – saving money and/or improving home value
- b. Within our RS-STEP #4.0 Professional service call handling process on-line session, your Dispatcher/Customer Care Manager and Technicians will learn how to use our call handling inbound scripts, Service-Right Survey Form, Service-Right Customer Awareness Handout and Fix-Right Service Repair Price Book call handling procedures to “harvest” more on all calls by “Doing the Right Thing on all Calls.”
<http://www.growmyhvac.com/webpages.asp?wpid=115>
- c. Within our RR-STEP #3.1 Closing more at higher margins with the "One-Call" Selling Process on-line session your Comfort Advisor and Selling-Technicians will learn how to use our Home Use & Livability Survey Form, Home Comfort Certified System Installation Flat Rate Presentation-Price Book, and associated Installed-Right Proposal Agreement to “harvest” more on all calls
<http://www.growmyhvac.com/webpages.asp?wpid=116>
- d. Within our CS-STEP #3.2 Professional service sales call handling process on-line session, your Commercial Service Agreement Sales Rep will learn how to use our proven Mechanical Safe-Guard Commercial Service brand desktop presentation and selling process, AccuPro Customer, Equipment, and Transaction Scope of Work Survey Forms, AccuPro Commercial Service Agreement Pricing Program, and professional service agreement proposal templates to increase your service agreement close rates, sell at higher gross profit margin levels, and systematically value based sell to acquire the business on one call.
<http://www.growmyhvac.com/webpages.asp?wpid=117>
- e. Within our CP-STEP #3.0 Professional sales call handling process on-line session, your Commercial Design-Build/Project Sales Rep will learn how

to use our proven Guardian Design-Build/Project brand desktop presentation and selling process, ProjectPro Customer, Equipment, and Transaction Scope of Work Survey Forms, ProjectPro Design-Build/Project Pricing Program, and professional design-build/project proposal templates to increase your project close rates, sell at higher gross profit margin levels, and systematically value based sell to acquire the business on one call.

<http://www.growmyhvac.com/webpages.asp?wpid=118>

2. **Implement systematic lead generations:** Marketing is another name for lead generation which is another name for customer awareness. HVAC contractors have four distinct marketing channels available to use making our customers aware of who we are and what we provide. Local area retail or commercial website presence, seasonally targeted direct campaigns, media campaigns if residential, and the use of professional call handling forms used on all sales and service calls. Naturally, the most prolific and profitable opportunities are found on your service call.

Available GrowMyHVAC.com Resources

- a. Even if your HVAC business is small you should have a website to establish a local market presence. Nowadays, more than 87% shoppers are now online, purchasing HVACR service repairs, tune-ups, upgrades, system fixes, system enhancements and energy efficient replacements. The Ready-Built HVAC website we provide you requires only a 1-page set-up form and less than 2 business days to go live. We use your existing website domain URL address or obtain one for you. Includes 20 free email addresses too. See Ready-Built HVAC website at www.GrowMyHVAC.com. More reasons to be on the web:
 1. The next good reason to put your business on the web, it is an inexpensively and simply way to pass out your business card to 100% of your potential clients. We make it possible for you to do this 24/7, on the internet.
 2. The Ready-Built HVAC website we provide does this and also makes your HVAC system related information available to everyone who wants it without any additional effort. You can give them answers to questions like:
 - (i) How to schedule a service repair
 - (ii) How to schedule a system Tune-up
 - (iii) How to schedule a request for quote
 - (iv) What repair options are available

- (v) What replacement or upgrades options are available
- (vi) How to make the replacement decision
- (vii) What are your today's specials
- (viii) How they can contact you to “ask an expert”
- (ix) Why people choose you first
- (x) How you save your customers money
- (xi) What are your 100% satisfaction guarantees
- (xii) Where you are located
- (xiii) What are your normal hours

3. Ready-Built HVAC website benefits

- (i) **Improved Customer Service:** Our online forms are used to allow customers to request quotations or ask for more information.
- (ii) **Present a Professional Image:** Our professionally designed Ready-Built HVAC website is a great way of instilling confidence and looking bigger than you actually are. By now, your primary competitors probably already have a presence on the Internet. The Ready-Built HVAC website allows you to them up by being simply better.
- (iii) **Gather Information and Generate Valuable Leads:** You can gather information about your customers and potential customers by using our forms and surveys. Rather than going out and getting leads, let them come to you. This is a great tool for prospecting targeted customers looking to use your HVAC products and services.
- (iv) **Provides Instant Gratification:** People are busy and don't like to wait for information. Give them what they want, when they want it. We enable you to offer them specials.
- (v) **Great Recruiting Tool:** Whether you are looking for talent or posting job opportunities with your company, your website is a great recruiting tool for building your business.

- b. Within our RS-STEP #2.0 Marketing residential service for profits on-line session, you will learn how to implement systematic awareness campaigns embedded within your service call handling processes, use of our Tune-up ad campaigns, and our Tune-up call direct mail and Tune-Up outbound calling script campaigns generate and convert more profitable service calls. See <http://www.growmyhvac.com/webpages.asp?wpid=115>
 - c. Within our RR-STEP #2.0 Marketing residential replacements for profits on-line session, you will learn how to identify your company's residential replacement marketing strategies and associated budgets and how best to implement systematic awareness campaigns through professional service call handling processes, as well as, through our seasonal replacement direct mail campaigns and media ads to generate and convert more profitable replacement leads to a close. See <http://www.growmyhvac.com/webpages.asp?wpid=116>
 - d. Within our CS-STEP #2.0 Marketing commercial service for profits on-line session, your Commercial Service Agreement Sales Rep will learn how to use our step-by-step service agreements lead generation and selling processes, direct mail campaigns, proven existing service agreement expansion strategies and tactics, owner occupied industries business list procurement assistance, help establish individual commercial sales rep sales quota-setting and sales tasking planning procedures, and individual lead tracking and performance reporting procedures. See <http://www.growmyhvac.com/webpages.asp?wpid=117>
 - e. Within our CP-STEP #2.0 Marketing retrofit/design-build for profits on-line session, your Commercial Design-Build/Project Sales Rep will learn how to use our proven step-by-step target industry design-build leads generation and selling program. See <http://www.growmyhvac.com/webpages.asp?wpid=118>
3. **Implement lead handling procedures:** Residential customer awareness leads come from technicians on service calls handling, comfort advisor on replacement sales call handling, direct mail and media campaigns and from consumer searching your and landing on your website. Commercial customer awareness leads also come from technicians on service calls and from commercial sales reps calling on a targeted set of owner occupied businesses within their service area. Residential and commercial contractors need to track their leads, sales close rates as well as lost or “lead burn rate” to identify their return on their technician training, and from ad and website hosting investment.

Available GrowMyHVAC.com Resources

- a. The Ready-Built HVAC website was designed professionally handle and track leads for consumer request for service repair, tune-ups, system enhancements, upgrades, system fixes, and replacements. You can view

the example Ready-Built HVAC client website here.

www.ReadyBuiltHVACwebsites.com

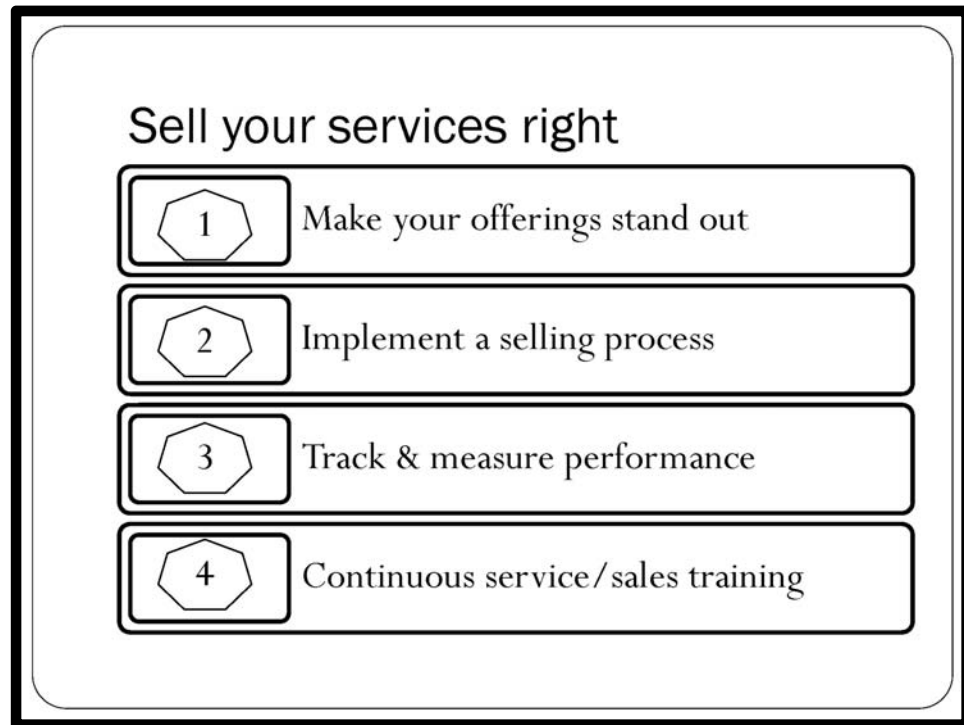
- b. Within our RR-STEP #3.0 Professional sales call handling process on-line session, you will learn how to use Lead Tracking Forms to track the status of all equipment replacement leads and their assignments to Comfort Advisors. See <http://www.growmyhvac.com/webpages.asp?wpid=116>
 - c. Within our CS-STEP #4.0 Professional service call handling process on-line session, your Commercial Service Agreement Sales Rep will learn how to use our weekly Lead Tracking Form and how to use our Backlog Report to communicate to management how many calls were made, number of appointments made, who and what was quoted for service agreements and projects, what the probability of close is for each, when expected to close with deal specific comments. See <http://www.growmyhvac.com/webpages.asp?wpid=117>
4. **Track and measure performance:** Every HVAC business owner wants their service and sales force to be more productive. Technician and Sales force performance is usually measured in terms of productivity benchmarks. Measures of productivity define the relationship between how many dollars were brought in per technician or salesperson compared to the cost of supporting that person. What we typically measure are: (1) Number of new service agreement customers acquired, (2) sales by service offering category, and (3) sales or lead conversion by individual service technician and/or sales rep.

Available GrowMyHVAC.com Resources

- a. Measuring Residential Service Productivity– See our RS-STEP #6.0 Daily labor and opportunity conversion performance benchmarking. See <http://www.growmyhvac.com/webpages.asp?wpid=115>
- b. Measuring Residential Installation Productivity– See our RR-STEP #6.0 Daily labor and opportunity conversion performance benchmarking. See <http://www.growmyhvac.com/webpages.asp?wpid=116>
- c. Measuring Commercial Service Productivity– See our CS-STEP #6.0 Daily labor and opportunity conversion performance benchmarking. See <http://www.growmyhvac.com/webpages.asp?wpid=117>
- d. Measuring Commercial Installation/Project Productivity– See our CP-STEP #6.0 Daily labor and opportunity conversion performance benchmarking. See <http://www.growmyhvac.com/webpages.asp?wpid=118>

#3 - Sell your services right!

We illustrate the 4-key areas where we help you sell your services right.



1. **Make your offerings standout:** Studies show that 98.9% of all HVAC contractors do not use a professional service call or sales call handling process that incorporates best practice retail or commercial buyer communication standards. These include customer and transaction scope of work survey forms, service or sales call presentations, customer awareness handouts, published price books, or proposal agreements/invoices.

Available GrowMyHVAC.com Resources

- a. Making your residential service calls stand out– See our RS-STEP #4.0 Professional service call handling process that includes a step-by-step proper phone call etiquette, understanding the service call handling objective, how to make a great impression, getting ready for the call, arriving to the call, greeting the customer using a script, interviewing the customer using our Service-Right Survey form, setting customer expectation using our Service-Right Customer Awareness Handout, problem diagnosis, informing customer of diagnosis using our Service-Right Invoice, executing the repair, tune-up, or service, debriefing customer and explaining the discount option to become a service agreement customer, call completion and debriefing with dispatcher, post service call close, or call customer to advise of return visit response time,

and finally making the “Happy Call” to the customer. See <http://www.growmyhvac.com/CourseModules.asp?CC=RRS>

- b. Making your replacement sales calls stand out - See our RR-STEP #3.1 Closing more at higher margins with the "One-Call" Selling Process that includes a step-by-step replacement sales call handling process to objectively evaluate both the customer and their system needs using the Home Use & Livability Survey forms, provide the customer facts and information to help them make the most informed decision as to what to do about their HVAC system, use our “good-better-best-premium” upfront flat rate pricing to gain credibility with customer and to sell at the highest possible margins, how to close the opportunity in one call, and achieve consistent customer satisfaction with the Friends & Family program. <http://www.growmyhvac.com/CourseModules.asp?CC=RR>
- c. Making your commercial service agreement sales calls stand out - See our CS-STEP #3.2 Professional service sales call handling process that includes a step-by-step service agreement sales call handling process to first professionalize the first contact using our Intro Letter Templates, customized Line Cards, first appointment Service Sales Presentation to present the Mechanical Safe-Guard Service Agreement Program, explain who you are, what makes you different, what regulatory compliant process you will use to give them exactly what they require at the lowest possible cost. How you will be sitting back down with customer following the survey to explore their options to either reduce operating costs or improve the quality of their program, use the AccuPro Customer, Equipment and Transaction Survey forms, and how to use our AccuPro pricing tool and the associated Service Agreement Templates. <http://www.growmyhvac.com/CourseModules.asp?CC=CS>
- d. Making your commercial design-build/project sales calls stand out - See our CP-STEP #3.0 Professional sales call handling process that includes a step-by-step design-build/project sales call handling process to first professionalize the first contact using our Intro Letter Templates, customized Line Card, first appointment Design-Build/Project Sales Presentation to present the Guardian Design-Build Program, explain who you are, what makes you different, what regulatory compliant process you will use to give them exactly what they require at the lowest possible cost. How you will be sitting back down with customer following the survey to explore their purchase options to either reduce operating costs or improve the quality of project, use the ProjectPro Customer, Equipment and Transaction Survey forms, and how to use our ProjectPro pricing tool and the associated Design-Build/Project Agreement Templates. <http://www.growmyhvac.com/CourseModules.asp?CC=CP>

2. **Implement a selling process:** Sales are at the core of any HVAC business. Without convincing the customers to purchase your service or installation, your business remains functionally dead and without revenue. The difficult step is in

convincing the individual customer to purchase your product over the competition, or worse, not buying anything at all. The professional selling process involves these nine essential steps that will help you close more deals; (1) meet and greet to explain who you are and what makes you different, (2) explain the regulatory compliant approach you will use, (3) explain why your company has to set the standards of performance in the area, (4) survey and qualify the customer's needs, (5) estimate and price, (6) present the solutions, (7) overcome objections, (8) Close, and (9) Follow Up.

Available GrowMyHVAC.com Resources

- a. See the above service call and sales call handling and selling processes.
- 3. **Track and measure performance:** Financial tracking is the only real measure of performance by a salesperson. Comparing what it cost to have that salesperson enables the company to assign a value to each individual salesperson.

Available GrowMyHVAC.com Resources

- a. See RR-STEP 2.0_Marketing_residential_replacement_for_profits which includes replacement marketing and lead management as well as CS-STEP #2.0 Marketing commercial service for profits which includes service agreement marketing and lead management.
- 4. **Continuous sales training:** Without having professional sales training, an HVAC company is unable to stand out from the rest, therefore having bad coverage and/or low credibility in the marketplace. To be able to accomplish and preserve good results, you need to make certain that your sales staff benefit from frequent sales training. Our online sales training provides your sales staff with all the fundamentals of professional sales call handling. It's essential to note that the majority of salespeople only boost their selling overall performance at initial training. You can also use our on-line tracks as ongoing sales training to help them maintain a fantastic degree of service agreement, installation, and design-build sales performance.

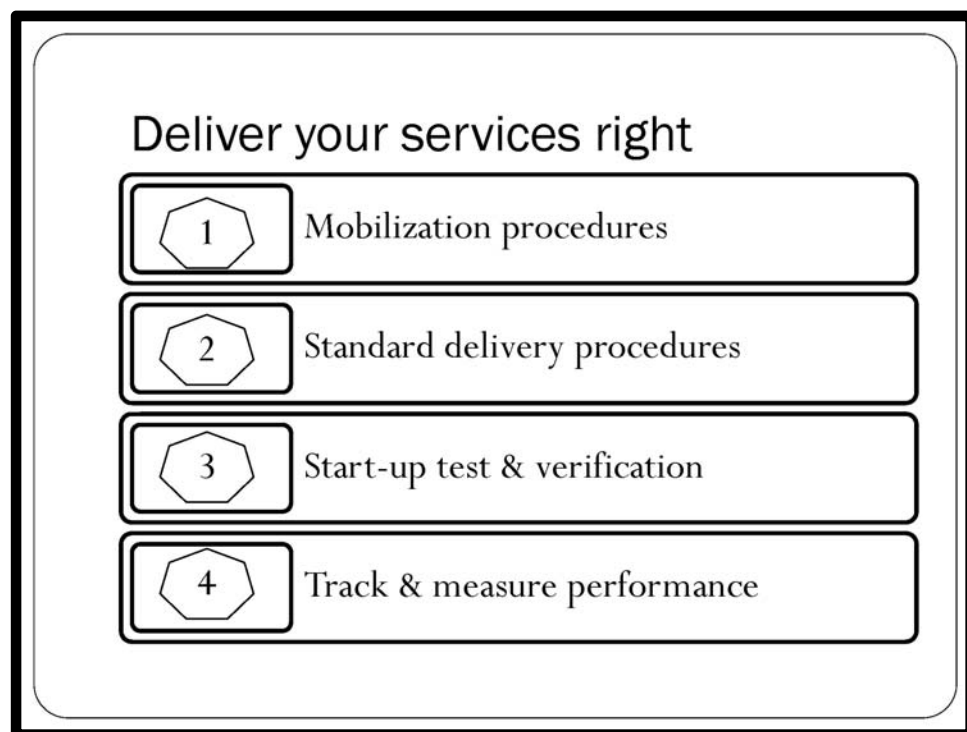
Available GrowMyHVAC.com Resources

- a. For Technician service call handling training – See RS-STEP #4.0 Professional service call handling process, RS-STEP #4.1 Service call objective-getting ready-arriving to the call, RS-STEP #4.2 Interviewing the customer and setting service call expectations, RS-STEP #4.3 Problem diagnosis-informing customer of diagnosis, and RS-STEP #4.4 Executing the repair, tune-up, or service.
- b. For residential replacement Selling-Tech/Comfort Advisor sales training – See RR-STEP #3.0 Professional sales call handling process and RR-STEP #3.1 Closing more at higher margins with the "One-Call" Selling Process.

- c. For commercial service agreement Sales Rep training – See CS-STEP #2.0 Marketing commercial service for profits, CS-STEP #3.3 Closing more service agreements at higher margins, CS-STEP #3.4 Understanding Building Owner-Operator Roles & Responsibilities, CS-STEP #3.5 Assessing Your Company, CS-STEP #3.6 Surveying Service Agreement Equipment-System Maintenance Requirements, CS-STEP #3.7 and Qualifying the “Real, Worth and Win” of a Service Agreement Deal.
- d. For commercial design-build/project Sales Rep training – See CP-STEP #2.0 Marketing retrofit/design-build for profits, CP-STEP #3.0 Professional sales call handling process, and CP-STEP #3.1 Qualifying the Real Worth Win of Opportunities.

#4 - Delivering your services right!

We illustrate the 4-key areas where we help you delivering your services right.



1. **Mobilizing procedures:** HVAC contractors require clear-cut execution of the work in an efficient and timely manner with strict control of cost, time, and quality. Service and project work should be scheduled far in advance as possible with sufficient flexibility retained to permit adjustment to meet unforeseen circumstances. The appropriate date for the actual start of work in the field should be predicated upon the receipt from your suppliers of all job related equipment, materials, parts, subs and permits, as well as availability of field labor resources.

Available GrowMyHVAC.com Resources

- a. Mobilizing demand service and calls waiting for parts – See RS-STEP #4.5 Efficient demand service written standard procedures.
 - b. Mobilizing residential replacements – See RR-STEP #4.0 Efficient replacement written standard procedures.
 - c. Mobilizing commercial service and calls waiting for parts – See CS-STEP #4.5 Efficient demand service written standard procedures.
 - d. Mobilizing commercial service agreements – See CS-STEP #4.6 Efficient service agreement written standard procedures.
 - e. Mobilizing commercial service quoted jobs – See CS-STEP #4.7 Efficient Quoted Repair written service standard procedures.
 - f. Commercial Design-Build/Projects – See CP-STEP #4.0 Efficient retrofit/Design Build written service standard procedures.
2. **Standard delivery procedures:** An SOP is a written document or instruction detailing all steps and activities of a process to deliver your work categories at the highest possible quality and customer satisfaction.

Available GrowMyHVAC.com Resources

- a. See our (6) residential and commercial written standard procedures that start from a lead and go step-by-step right through to job close out.
3. **Start-up, test & verification:** Using our residential and commercial manufacturer required Pre-start, Start-up, Test and Verification checklist forms should be required for the heating equipment associated with the air handling system to be tested to the extent required for design performance of the HVAC equipment and associated air handling equipment.

Available GrowMyHVAC.com Resources

- a. See our RR-STEP #4.0 Efficient replacement written standard procedures.
- b. See our CP-STEP #4.0 Efficient retrofit/Design Build written service standard procedures.

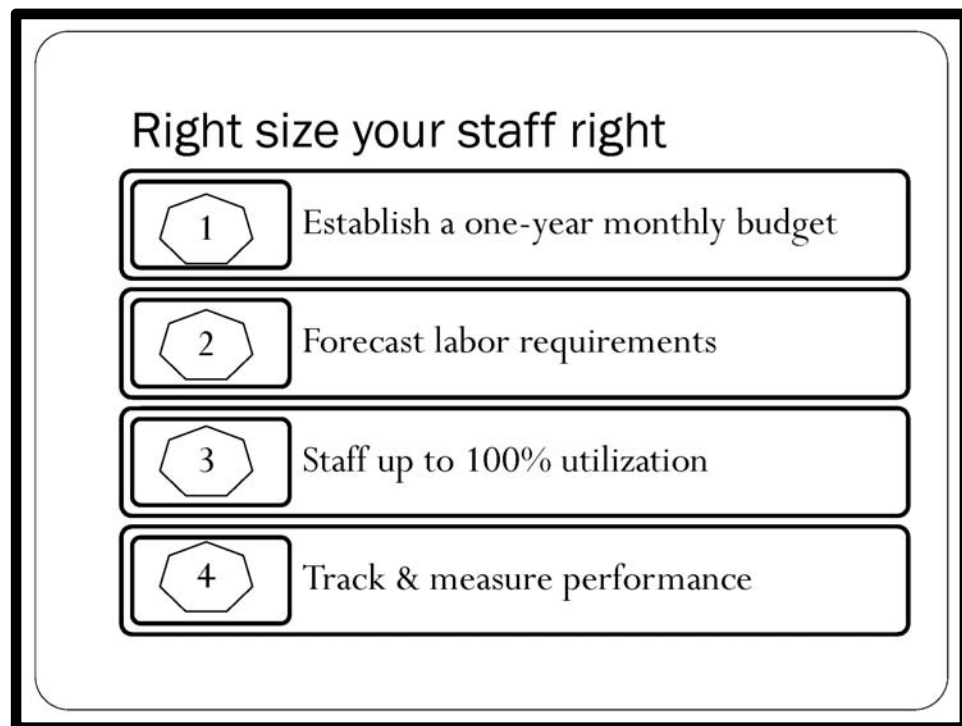
4. **Track and measure performance:** Fundamental purpose behind job financial measures is to improve profit performance. Measures that are directly connected to improving performance are measures that are the means to achieving that ultimate purpose – each job's estimated gross profits. Tracking each job's actual to budget for labor, material, subs, and permits, cost of goods sold as well as for actual to estimated budget gross profits is key to operating success. Not all jobs come in as planned. When jobs don't come in as planned, then you need to know why and what can be done to fix the situation and/or adjust your pricing method to assure you will obtain your future estimated gross profits.

Available GrowMyHVAC.com Resources

- a. See our BudgetPro financial forecasting by work category and our above pricing programs included in each of our on-line department tracks.

#5 - Right size your staff right!

We illustrate the 4-key areas where we help you right size your staff right.



1. **Establish a one-year labor budget by work category:** As the owner or manager of a HVAC business, your primary charge is to keep it running efficiently and effectively. This means you need the right number of appropriate staff performing functions within their scope of work and

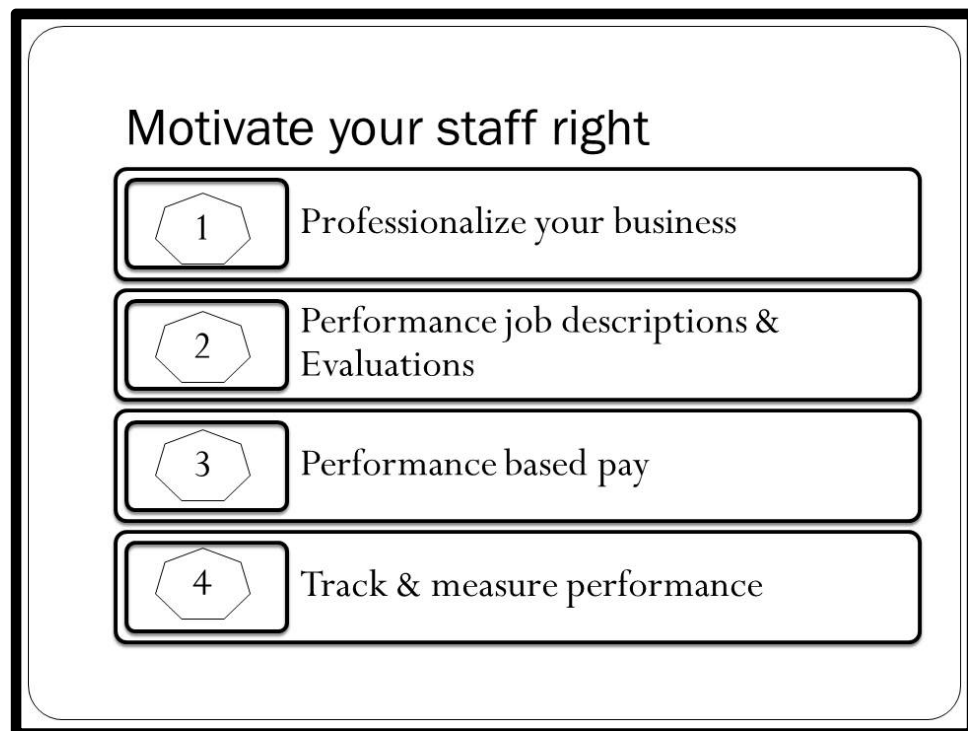
expertise. Every staffing decision calls for careful consideration. Not having adequate staff in certain delivery areas of the organization can compromise business effectiveness and financial stability. Having staff that is not fully utilized often makes your overhead higher than your competition. At no time should either one of these factors exist.

Available GrowMyHVAC.com Resources

- a. See our BudgetPro financial forecasting by work category and our above pricing programs included in each of our on-line department tracks and the manpower loading forms.
2. **Forecast labor requirements:** See our BudgetPro labor forecasting.
3. **Staff up to 100% utilization:** See our BudgetPro labor forecasting.
4. **Track and measure performance:** See our BudgetPro financial and labor forecasting.

#6 – Motivate your staff right!

We illustrate the 4-key areas where we help you motivate your staff right.



1. **Professionalize your business:** When the company seeks to remove obstacles to their success by implementing proper business process delivery systems, our SOP's is an excellent way for HVAC managers, support staff, and field personnel to cooperate for good of all. Huge gains in productivity and morale are derived from the positive sense of teamwork and accomplishment that arises when everyone successfully works together toward common objectives and goals.

Available GrowMyHVAC.com Resources

- a. See our (6) residential and commercial written standard procedures that start from a lead and go step-by-step right through to job close out.
2. **Performance job descriptions and evaluations:** Job descriptions should be clear, understandable, and specific enough to provide direction for staff behavior. Our HVAC job descriptions focus on what each staff member does and what outcomes are expected. These outcomes are clearly linked to HVAC departmental objectives and needs. Our job descriptions include effective means to objectively conduct individual ongoing performance evaluations of both the position and how well the staff member is meeting your behavior expectations. With our ongoing position analysis and performance evaluations, there are few surprises, and changes in the business environment are quickly incorporated into our customizable performance based HVAC job description and evaluation system.

Available GrowMyHVAC.com Resources

- a. See our HR-STEP #1.0 Implementing job descriptions and performance evaluations located within the Human Resource Management Department Training Track.
3. **Performance based pay:** Individual employee performance, productivity, and motivation can all be tied to how invested a worker feels in his or her company. That's what makes profit sharing such a powerful tool – especially when he/she is consistently successful at his/her job contributions to the company's bottom line. The objective of a profit sharing performance based pay plan is to encourage employee identification with the organization's success. Performance based pay plans tell your staff that "We're in this together, and everybody's focused on profit contributions."

Available GrowMyHVAC.com Resources

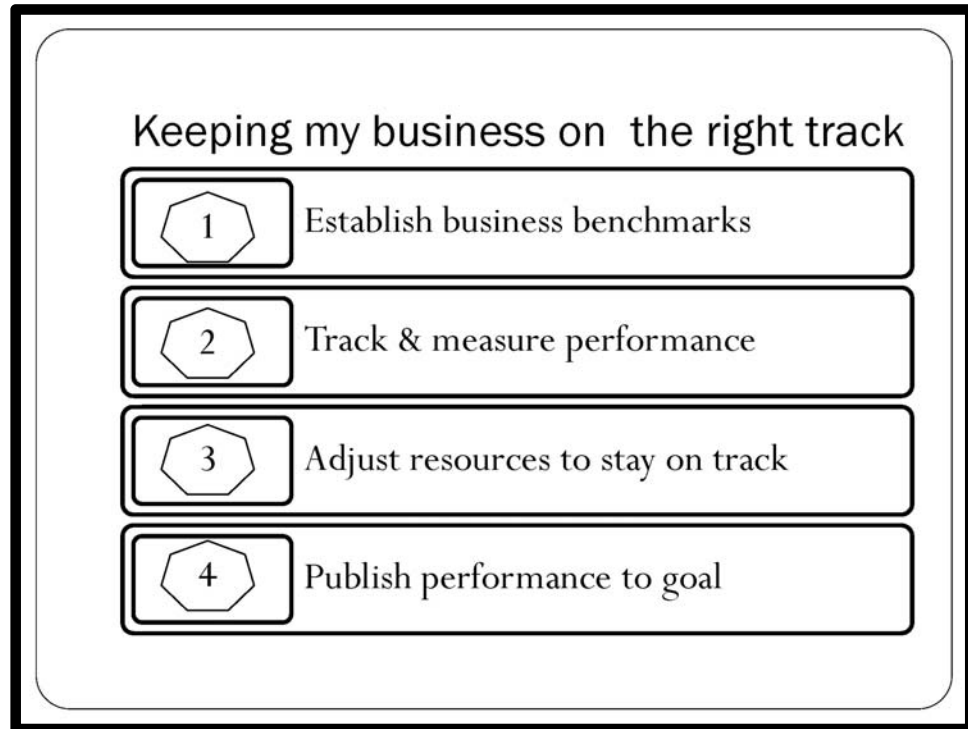
- a. See residential Service Technician performance based pay at RS-STEP #7.0 Paying Technicians/Tune-up Specialists for Profits located within the Retail Residential Service Department Training Track.
- b. See residential Installer Crew Chief and Helper performance based pay at RR-STEP #7.0 Paying Crew Chiefs/Installers for Profits located

within the Retail Residential Installation Department Training Track.

- c. See residential Comfort Advisor/Selling Tech performance based pay at RR-STEP #7.1 Paying Replacement Salespeople for Profits for Profits located within the Retail Residential Service Department Training Track.
 - d. See commercial Service Technician performance based pay at CS-STEP #7.0 Paying Technicians/Tune-up Specialists for Profits located within the Commercial Service Department Training Track.
 - e. See commercial Service Sales Rep performance based pay at CS-STEP #7.1 Paying commercial sales reps for Profits for Profits located within the Commercial Service Department Training Track.
 - f. See commercial Installer performance based pay at CP-STEP #7.0 Paying retrofit/design build labor for Profits for Profits located within the Commercial Design-Build/Project Department Training Track.
4. **Track and measure performance:** See the above performance based pay plans for participant self-administration, tracking and how to best pay out plans.

#7 – Keeping your business on the right track!

We illustrate the 4-key areas where we help you keeping your business on the right track.



1. **Establish business benchmarks:** Benchmarking is being used by HVAC managers as a means of internal performance comparison and improvement. Drawing on interviews with HVAC owners and managers and a questionnaire survey of over 1500 contractors found that the most common benchmarking we use is for financial performance, individual labor productivity, and customer satisfaction and quality of our services and installations.

Available GrowMyHVAC.com Resources

- a. Financial operating performance benchmarking: See our BudgetPro financial and labor forecasting program which includes financial operating benchmarking and strategies, as well as, our FM-STEP #2.0 Business Performance benchmark set-up located in our Financial Management Department Training Track.
- b. Residential technician department and individual performance benchmarking – see our RS-STEP #6.0 Daily labor and opportunity conversion performance benchmarking located within our Retail Residential Service Department Training Track.

- c. Residential installation installer department and individual performance benchmarking – see our RR-STEP #6.0 Daily labor and opportunity conversion performance benchmarking located within our Retail Residential Replacement Department Training Track.
 - d. Residential installation comfort advisor department and individual performance benchmarking – see our RR-STEP #6.0 Daily labor and opportunity conversion performance benchmarking located within our Retail Residential Replacement Department Training Track.
 - e. Commercial technicians department and individual performance benchmarking – see our CS-STEP #6.0 Daily labor and opportunity conversion performance benchmarking located within our Retail Residential Service Department Training Track.
 - f. Commercial installation installer department and individual performance benchmarking – see our CP-STEP #6.0 Daily labor and opportunity conversion performance benchmarking located within our Commercial Design-Build/Project Department Training Track.
- 2. Track and measure performance:** See the above benchmarking sessions.
- 3. Adjust resources to stay on track:** At times you may need to adjust the budget's projected resource allocations to stay on track when outside forces, personnel or budget issues affect financial performance. Our financial management system allows you to track progress, spot potential problems and adjust its activities without compromising the program's goals.

Available GrowMyHVAC.com Resources

- a. See the above BudgetPro financial management program, as well as, our Benchmarking session.
- 4. Publish performance goals:** In many HVAC companies, performance results are commonly posted for technicians and sales personnel. Our program encourages posting individual performance goals and results on a weekly basis for all employees. This includes quality (error rates call-backs) versus number of calls completed. Just demonstrating that measurement is taking place will drive results, with some contractors increasing performance improvement by +65%. Many companies also see error rates go down from 10%-15% to 1%-3%. When posting performance occurs, it tends to get everyone to completing an equal share of the work load as much as possible to keep their productivity performance results in line with everyone else's. Our posting encourage the use of recognition and performance reward programs to help improve performance gains.

Available GrowMyHVAC.com Resources

- a. See our above benchmarking sessions.

Chapter #3 –Overcoming Poor Profitability

“If your goal is anything but profitability - if it's to be big, or to grow fast, or to become a technology leader - you'll hit problems.” ~ Michael Porter.

Did you know that poor profitability is pervasive throughout the HVAC industry? Here are some alarming facts. There are roughly 72,000 HVAC Contractors throughout the U.S. They ALL share a single common goal...they want to be successful --- for their families, their employees, their customers, and themselves.

Per the US Census Bureau, the average HVAC contractor makes only 2.3% net profit before taxes. That's dangerously close to not being in business at all given the type of job risk we assume in our industry. Our distributor partners provide further proof this situation is very real by telling us that no matter the economy, up to 10% of all HVAC companies experience serious cash flow problems and/or suffer catastrophic business failures each year.

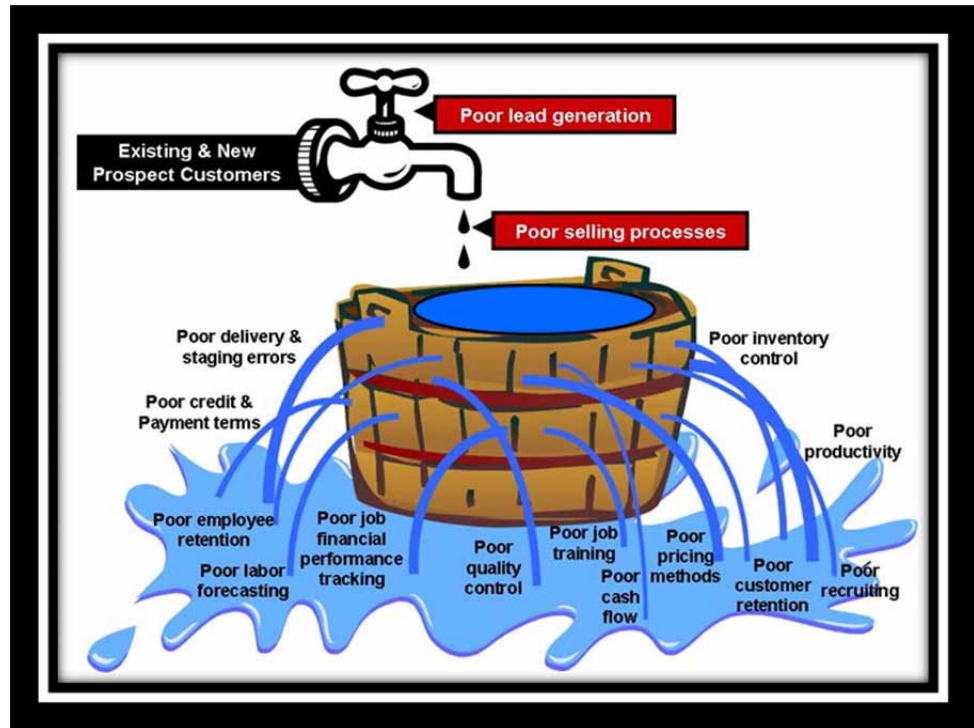
What is causing such poor profitability? Here are the highlights:

- Poor or no lead generation.
- Lack of professional service and sales calls handling procedures.
- Absence of defined operating processes.
- Under-pricing as a primary closing mechanism—for work.
- Lack of company brand differentiation and general marketing skills.
- Low close rates, usually <35%.
- Poor labor management.
- Lack of financial management skills and business mix tracking.

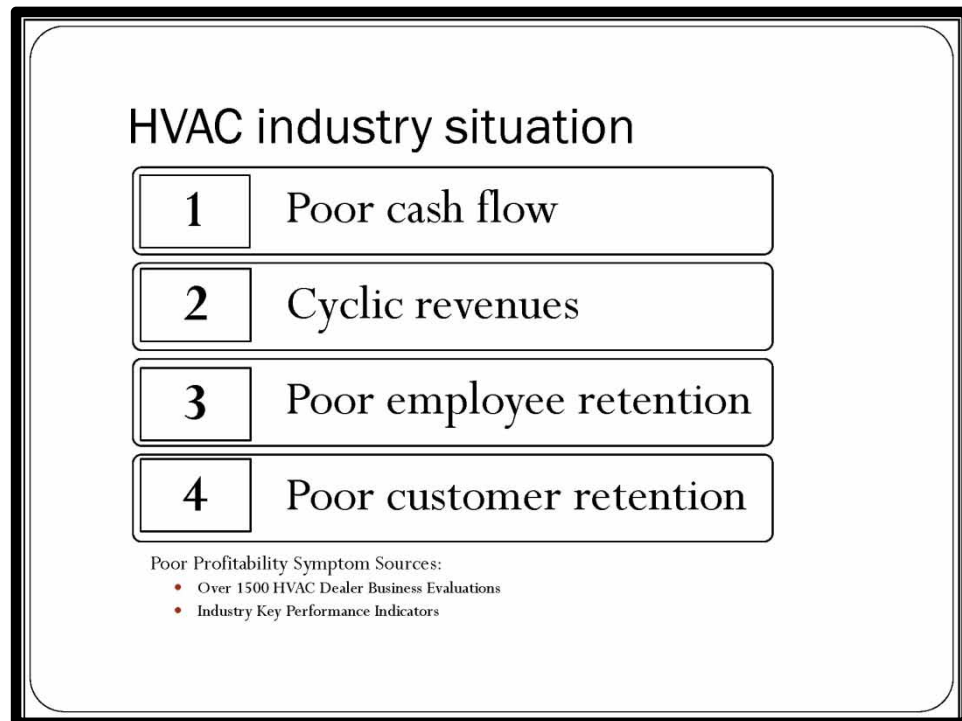
GrowMyHVAC.com uses the metaphor of a “Leaky Bucket” to initiate conversations in a HVAC business about money flows into and out of that business. We explain the business as a bucket with water being poured into it from a main pipe representing lead generation processes and a faucet representing selling processes used for demand service, service agreements, retrofits, and design-build. We consider all the ways that

money then leaks out of the bucket as unnecessary expenses, such as poor surveying, estimating and pricing, job errors, expense overruns, poor training, and poor retention of customers and employees.

We illustrate the “Leaky Bucket” below of what poor profitability common causes look like in lost profits for the average HVAC business.



We have conducted over 1500+ on-site and on-line HVAC business evaluations and have found that the above poor process related situations can be grouped into 4 common poor profitability symptoms:



1. **Poor Cash Flow:** The business experiences operating expenses often greater than cash coming in to pay for them. Poor lead generation, poor payment terms, poor operating and delivery processes produce chaos. Chaos leads to poor cash flow. You can use GrowMyHVAC.com to make these poor business processes and the cash flow problems disappear.
2. **Low or cyclic revenues:** The business has poor lead generation processes resulting in “Feast or Famine” sales. They typically fail to build their maintenance agreement base. They typically fail to advertise and/or to make customers aware on all service and sales calls what their options are to improve their situation for comfort, health, safety, property and financial, which results in poor or cyclic revenues. You can use GrowMyHVAC.com to make these cyclic revenue problems disappear.
3. **Poor Employee Recruiting/Retention:** The business has a poor employee recruiting and retention process which prevents them from finding, getting and keeping good people. Most managers think their employees switch jobs for better pay; however, better pay is rarely the primary reason people switch jobs. Most people want to feel *Trust, Hope, Worth, and Competent* through job training. When they have trouble finding these things, they will often seek new opportunities. You can use GrowMyHVAC.com to make these recruiting and employee retention problems disappear.
4. **Poor Customer Retention:** The business has poor customer retention which absolutely kills knell to any service based HVAC business. Why do customers leave?

- a. 70% are upset with the treatment they've received = poor processes
- b. 20% are dissatisfied with quality of your product or service = poor processes
- a. 6% other
- b. 3% move away
- c. 1% die

You can use GrowMyHVAC.com to make these poor customer retention problems disappear.

Overcoming poor cash flow

If the cash flowing into a business does not meet in a timely manner the cash flowing out, then eventually a company will be unable to meet its debt obligations and could be forced out of business. Hence the old saying "Cash is King".

The poor cash flow symptom is defined as more cash flowing out than in – and is the single biggest reason why many HVAC businesses fail. Even though the services you provide may be top quality and your business is sound in every other way, if cash flow is not managed, your business could disappear.

Here are 9 important business processes that can positively affect your cash flow if done properly:

1. **Proper Project/Service Surveying, Estimating and Pricing Procedures:**

Without proper surveying, estimating and pricing procedures, it is difficult to professionally and consistently sell your services or project work. Without proper surveying, estimating, and pricing contractors often fail to protect the company against costly job losses, liabilities, and human error.

Available GrowMyHVAC.com Resources

- a. **Need residential demand service help?** – See our Residential Professional Service Call Handling Procedures and our award winning Fix-Right Service Price Book at:
<http://www.growmyhvac.com/webpages.asp?wpid=115>
- b. **Need residential replacement installation help?** – See Residential Professional Sales Call Handling Procedures and our Home Comfort Installation Price Book at:
<http://www.growmyhvac.com/webpages.asp?wpid=116>
- c. **Need commercial service agreement help?** – See our Professional Service Agreement Sales Call Handling Procedures and our AccuPro Commercial Service Agreement Pricing Program at:
<http://www.growmyhvac.com/webpages.asp?wpid=117>

- d. **Need design-build/project help?** – See our Professional Design-Build/Project Sales Call Handling Procedures and our ProjectPro Surveying, Estimating and Project Pricing Program at:
<http://www.growmyhvac.com/webpages.asp?wpid=118>

- 2. **Proper Overhead Allocation Procedures:** Without properly departmentalizing a company's financials by work category it cannot accurately identify and properly allocate by work category its true delivery overheads. When a company combines overheads it often results in losing project business by overpricing lower overhead project work and losing you profits by underpricing higher overhead demand service and service agreement work.

Available GrowMyHVAC.com Resources

- a. **Need departmental overhead allocation help?** See our BudgetPro at:
<http://www.growmyhvac.com/webpages.asp?wpid=119>

- 3. **Proper Financial Forecasting Procedures:** Without financial forecasting, contractors cannot operate their business on a weekly, monthly and annual financial budgets basis, as well as prevents their ability to properly respond to variations in cash in and cash out resulting in poor cash flow.

Available GrowMyHVAC.com Resources:

- a. **Need financial forecast help?** Again, see our BudgetPro forecasting program.

- 4. **Proper Collections and Account Receivable Procedures:** Poor collections and accounts receivable aging often results in cash flow problems. This can occur when contractors do not operate their business using appropriate accounts receivable best practice operating procedure

Available GrowMyHVAC.com Resources

- a. **Need collection and accounts receivable help?** See our Collections and Accounts Receivable Procedures and Forms at:
<http://www.growmyhvac.com/webpages.asp?wpid=119>

- 5. **Proper Inventory Control Procedures:** Poor inventory control often results in unnecessarily high overheads, and higher than necessary cost of goods sold and company tool expenses. It occurs because contractors do not operate their business using appropriate inventory control procedures for technician service truck and job stock, and for non-truck service and company stock, and also for

purchasing and tracking company tools.

Available GrowMyHVAC.com Resources

- a. **Need inventory control help?** See our Inventory Control Written Standard Procedures and Forms at:
<http://www.growmyhvac.com/webpages.asp?wpid=119>

- 6. **Proper Labor Forecasting Procedures:** Poor labor forecasting results in labor overruns and shortfalls or worse - cash flow problems. It occurs because contractors do not use labor forecasting and/or do not operate their business using weekly, monthly, and annual labor budgets to actual.

Available GrowMyHVAC.com Resources

- a. **Need labor forecasting help?** Again, see our BudgetPro labor forecasting program.

- 7. **Proper Payment and Liability Protection Procedures:** Poor payment and liability protection occurs when contractors do not use appropriate payment and transaction terms and conditions in their proposal agreements, which often results in serious disruptions in cash flows and/or job costs overruns. This often occurs because contractors do not use best practice proposal agreements or invoices that adequately define the scope of work, protect payments and minimize job risk liabilities for all work categories.

Available GrowMyHVAC.com Resources

- a. **Need payment and liability protection help?** See our FM-STEP #3.0 Invoice and proposal risk and liability protection terms and conditions track at:
<http://www.growmyhvac.com/webpages.asp?wpid=106>

- 8. **Proper Lead Generation Procedures:** Poor lead generation occurs when contractors do not use a systematic lead generation process via targeted seasonal media or direct mail marketing campaigns. Another reason is they do not use professional “harvesting” service and sales call handling processes that consistently makes customers and prospects aware of their options to improve their situation for comfort, health, safety, property, and financial.

Available GrowMyHVAC.com Resources

- a. **Need residential demand service lead generation help?** See our Service Call Lead Generation Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=115>
 - b. **Need residential replacement installation lead generation help?** See our Equipment Replacement Lead Generation Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=116>
 - c. **Need commercial service agreement lead generation help?** See our Service Agreement Lead Generation Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=115>
 - d. **Need design-build/project lead generation help?** See our Design-Build Lead Generation Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=118>
9. **Proper Selling Procedures:** Poor selling occurs on demand service calls when contractors fail to use a professional service call handling process to increase the average service ticket and sell more service agreements and system enhancements and at a higher gross profit margin.

We find that poor selling procedures occur on installation and design-build/project sales when contractors do not use professional value-based sales call handling procedures to secure new business at the highest possible margin.

Available GrowMyHVAC.com Resources

- a. **Need demand service call handling help?** See our Professional Service Call Handling Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=115>
- b. **Need commercial demand service call handling help?** See our Professional Service Call Handling Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=117>
- c. **Need residential replacement installation value-based sales call handling help?** See our Professional HVAC Replacement Sales Call Handling and Installation Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=116>
- d. **Need commercial service agreement sales call handling help?** See our Professional Service Agreement Sales Call Handling Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=117>

- e. **Need design-build/project sales call handling help?** See Professional Design-Build/Project Sales Call Handling Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=118>

Overcoming cyclic revenues

Cyclic revenues, also commonly known as “feast or famine sales”, is often the result of a failure to build a maintenance agreement base, the failure to seasonally advertise, or to make customers aware of offerings by exploring on all service and sales calls what the customer options are to improve their comfort, health, safety, property, or financial situations.

Here are 4 important business processes that can positively affect your cyclic revenues if done properly:

1. **Proper Installation/Project and Service Pricing Procedures:** Uncompetitive pricing occurs when not using accurate pricing methods that properly allocate overheads and often results in overpricing low overhead project work and underpricing higher overhead service work.

Available GrowMyHVAC.com Resources

- a. **Need residential demand service pricing help?** – See our award winning Fix-Right Service Repair Flat Rate Price Book.
 - b. **Need residential installation pricing help?** – See your preferred equipment brand with our Home Comfort Installation Flat Rate Price Book at:
<http://www.growmyhvac.com/webpages.asp?wpid=113>
 - c. **Need commercial service agreement pricing help?** – See our AccuPro Commercial/Industrial Service Agreement Inspection, Full Labor and Full Coverage Pricing Program.
 - d. **Need design-build/project pricing help?** – See our ProjectPro Retrofit and Design-Build Project Pricing Program.
2. **Proper Lead Generation Procedures:** Without proper use of targeted direct marketing, or if residential HVAC, media advertising often results in cyclic revenues.

Available GrowMyHVAC.com Resources

- a. **Need residential service agreement program help?** – See our Service Call Lead Generation Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=115>

- b. **Need residential installation lead generation help?** –See our Equipment Replacement Lead Generation Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=116>
 - c. **Need commercial service agreement lead generation help?** –See our Service Agreement Lead Generation Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=117>
 - d. **Need design-build/project lead generation help?** –See our Design-Build Lead Generation Procedure at:
<http://www.growmyhvac.com/webpages.asp?wpid=118>
3. **Proper Service Call and Sales Call Handling Procedures:** Without proper professional service and sales call handling processes, that consistently makes customers aware of what their options are to improve their situation for comfort, health, safety, property, and financial often results in missed opportunities and cyclic revenues.

Available GrowMyHVAC.com Resources

- a. **Need professional residential service call handling help?** –See our the Professional Service Call Handling Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=115>
 - b. **Need professional residential installation sales call handling help?** – See our Professional HVAC Replacement Sales Call Handling and Installation Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=116>
 - c. **Need commercial service agreement sales call handling help?** – See our Professional Service Agreement Sales Call Handling Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=117>
 - d. **Need design-build/project sales call handling help?** –See our Professional Design-Build/Project Sales Call Handling Procedure at:
<http://www.growmyhvac.com/webpages.asp?wpid=118>
2. **Proper Service Agreement Base Building Procedures:** The best HVAC residential contractors implement systematic service agreement selling processes to proactively sell service departments. Residential HVAC contractors use tune-up ads and tune-up call scripts to expand their customer base and to maintain the proper number of service calls per technician per day. Once on a service call, the residential technician uses flat rate service pricing to increase the average service ticket revenue while closing more service agreements by showing a service agreement discount on each invoice as an incentive to sell more service agreements.

Commercials contractor sales reps do business-to-business service agreement marketing using cleaned business-to-business lists of owner occupied industries to generate appointment leads. Once presented, the commercial Sales Reps uses a professional service agreement selling process.

Available GrowMyHVAC.com Resources

- a. **Need residential service agreement building help?** –See our Professional Service Call Handling Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=115>
- b. **Need commercial service agreement building help?** –See our Professional Service Agreement Sales Call Handling Procedures at:
<http://www.growmyhvac.com/webpages.asp?wpid=117>

Overcoming poor customer retention

The cost of poor customer retention is enormous. When customers leave your business they are taking their money to competitors. You've not only lost revenue for your business, you've increased the profitability of your competition! It's a "double whammy" that can irreparably damage your business.

Retaining your customer base is critical to your success. If you don't give your customers a good reasons to stay, your competitors will give them a reason to leave. To sell more, it is far less expensive to cultivate existing customers than it is to find new customers. In fact, studies show that retaining 1 customer is 5-7 more profitable than acquiring one new one.

What you must do is to identify and initiate fixes to aspects of your business delivery processes that lessen customer dissatisfaction due to job completion delays, disruptive call backs and unmet delivery expectations.

Here are 2 important business processes that can positively affect customer satisfaction and retention if done properly.

Available GrowMyHVAC.com Resources

1. **Proper Job Staging and Mobilization Procedures:** Without the use of proper job staging results in losses in productivity, proficiency, scheduling, as well as labor and material delivery errors or worse lost customers. Why this occurs is because most contractors do not have in place written standard operating procedures and associated process forms too systematically and efficiently stage and deliver jobs free of errors.

- a. **Need residential installation job staging, mobilization and delivery help?** – See our RR-STEP #4.0 Efficient replacement written standard procedures included in our Retail Residential Installation Department Training Track at:
<http://www.growmyhvac.com/CourseModules.asp?CC=RR>
 - b. **Need commercial service agreement job staging, mobilization and delivery help?** – See our CS-STEP #4.6 Efficient service agreement written service standard procedures included in our Commercial Service Department Training Track at:
<http://www.growmyhvac.com/CourseModules.asp?CC=CS>
 - c. **Need commercial quoted service job staging, mobilization and delivery help?** – See our CS-STEP #4.7 Efficient Quoted Repair written service standard procedures included in our Commercial Service Department Training Track at:
<http://www.growmyhvac.com/CourseModules.asp?CC=CS>
 - d. **Need written design-build/project job staging, mobilization and delivery help?** – See our CP-STEP #4.0 Efficient retrofit/Design Build written service standard procedures included in our Commercial Service Department Training Track at:
<http://www.growmyhvac.com/CourseModules.asp?CC=CP>
2. **Proper Quality Control Procedures:** Without the use of proper use of consistent quality control result in higher non-chargeable job labor cost, equipment and material rework costs, unnecessarily high call-backs, and or worse lost customers.

Available GrowMyHVAC.com Resources

- a. **Need quality control procedures help?** – See the above written standard procedures for all work categories included in each department training track.

Overcoming poor employee retention

Do you know what low levels of employee morale could be costing your organization? Low morale is the leading cause of employee turnover and poses a massive barrier to effectively retain your best employees. According to Sirota Survey Intelligence and the authors of The Enthusiastic Employee, 63% of those who do not feel treated with respect intend to leave within two years.

How well respected employees feel is also directly related to how enthusiastic they are about their overall employment situations. The main reason employees don't feel they are treated with respect or fairly isn't due to abusive behavior by management, instead

with management's perceived indifference. It is the failure of management to properly train, monitor, recognize, compensate or reward employees for job performance well done, that has the most impact on how employees feel, and employers' ability to retain them.

Here are 4 important business processes that can positively affect employee recruiting and retention if done properly.

Available GrowMyHVAC.com Resources

1. **Proper Compensation, Incentive and Rewards Procedures:** Without the use of proper compensation, incentives or recognition reward plans, it often results in unmotivated and unproductive employees and poor employee retention. It occurs because most contractor companies do not have appropriate profit focused compensation, incentives, and recognition reward programs to motivate employees to higher levels of performance to consistently meet and/or exceed customer and company goals and objectives.
 - a. **Need residential technician performance based pay help?** – See our RS-STEP #7.0 Paying Technicians/Tune-up Specialists for Profits included in the Retail Residential Service Department Training Track at: <http://www.growmyhvac.com/CourseModules.asp?CC=RRS>
 - b. **Need residential installer performance based pay help?** – See our RR-STEP #7.0 Paying Crew Chiefs/Installers for Profits included in the Retail Residential Installation Department Training Track at: <http://www.growmyhvac.com/CourseModules.asp?CC=RR>
 - c. **Need residential comfort advisor performance based pay help?** – See our RR-STEP #7.1 Paying Replacement Salespeople for Profits included in the Retail Residential Installation Department Training Track at: <http://www.growmyhvac.com/CourseModules.asp?CC=RRS>
 - d. **Need commercial technician performance based pay help?** – See our CS-STEP #7.0 Paying Technicians/Tune-up Specialists for Profits included in the Commercial Service Department Training Track at: <http://www.growmyhvac.com/CourseModules.asp?CC=CS>
 - e. **Need commercial installer performance based pay help?** – See our CP-STEP #7.0 Paying retrofit/design build labor for Profits included in the Commercial Design-Build/Project Department Training Track at: <http://www.growmyhvac.com/CourseModules.asp?CC=CP>
 - f. **Need commercial service sales rep performance based pay help?** – See our CS-STEP #7.1 Paying commercial sales reps for Profits included

in the Retail Residential Installation Department Training Track at:
<http://www.growmyhvac.com/CourseModules.asp?CC=CS>

- g. Need design-build/project sales rep performance based pay help?** – See our CP-STEP #7.1 Paying commercial design-build/project sales reps for Profits at:
<http://www.growmyhvac.com/CourseModules.asp?CC=CP>

- 2. Proper Labor Performance Management Procedures:** Without the use of a proper performance based job description that clearly explains the job duties, behavior and performance expectations, it results in unmotivated employees, high unproductive time, job errors, and missed company and customer goals and objective and disruptive and costly employee turnover.

Available GrowMyHVAC.com Resources

- a. Need performance based job descriptions help?** – See our complete set of Performance Based Job Descriptions and Evaluations included in the Human Resource Management Department Track at:
<http://www.growmyhvac.com/webpages.asp?wpid=120>
- 3. Proper Individual Job Training Procedures:** Without the use of proper job training, it results in losses in productivity, proficiency, and delivery errors. It occurs because most contractors have not implemented individual job training and/or use written standard work delivery procedures and associated process forms to provide the “How-to-do” book to deliver their business by work category or individual job training programs.

Available GrowMyHVAC.com Resources

- a. Need residential service department job training help?** – See our RS-STEP #4.5 Efficient demand service written service standard procedures included in the Retail Residential Service Department Training Track at:
<http://www.growmyhvac.com/CourseModules.asp?CC=RRS>
- b. Need residential installation department job training help?** – See our RR-STEP #4.0 Efficient replacement written standard procedures included in the Retail Residential Installation Department Training Track at:
<http://www.growmyhvac.com/CourseModules.asp?CC=RR>
- c. Need commercial service department job training help?** – See our CS-STEP #4.5 Efficient demand service written service standard procedures included in the Commercial Service Department Training Track at:
<http://www.growmyhvac.com/CourseModules.asp?CC=CS>

- b. Need design-build/project department job training help?** – See our CP-STEP #4.0 Efficient retrofit/Design Build written service standard procedures included in the Commercial Design-Build/Project Department Training Track at:

<http://www.growmyhvac.com/CourseModules.asp?CC=CP>

“Your commercial service HVAC business processes pulled me out of bankruptcy, freed up more time for me and my family, and now even after the market crashed – is making me much more money. This program is a no brainer”.

Robert White
AirEconomics, KY.

Chapter # 4 – Your Success is Just One Click Away!!

Today, GrowMyHVAC.com is the world's leading residential and commercial HVAC/R marketing, sales, and operations management education center with more than 2000+ clients throughout United States and Canada. Through our six complete best-practice HVAC departmental tracks, forms, price books and implementation support, BSI helps its client contractors through its team of Business Fitness Coaches to implement proven accelerated growth and sustained profitability processes.

Each department track provides a set of proven business processes, methodologies, and governances for a successful Retail Residential or Commercial HVAC business, designed to FAST TRACK your business growth and development efforts. Each department track also includes unlimited expert implementation support coaching and mentoring. See detailed descriptions of our offering at www.GrowMyHVAC.com.

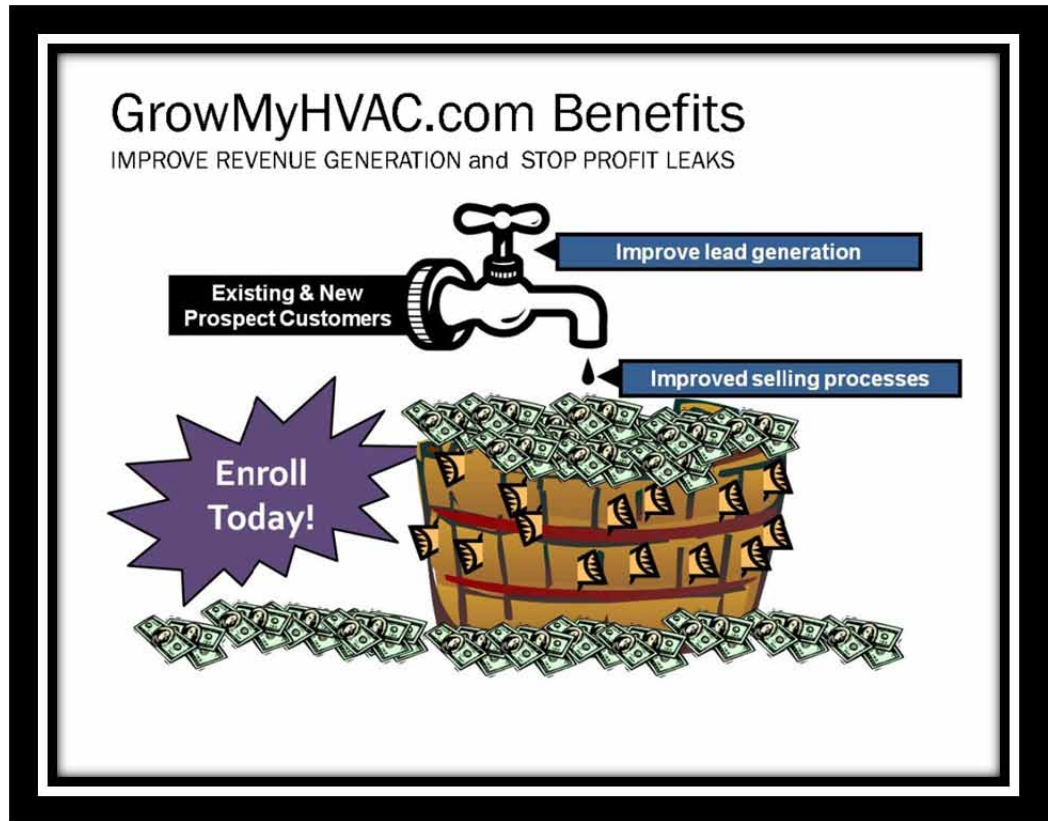
GrowMyHVAC.com provides more than just online training and expert coaching – it also opens up a world of opportunities for you and your HVAC business. It is powered by Building Services Institute's 15+-year history of success in HVAC business development, professional development, and staff education. It is the GrowMyHVAC.com Advantage.

Ready-Built HVAC programs increase revenues & stop the profit leaks

We just presented a program that includes all franchise like components. Franchise costs between \$25K-\$68K initiation fees, plus another 4%-8% of your revenues with no performance or return on investment guarantees.

What is this program worth? How about only \$35 – \$75 per month depending training package for a complete department? That's less than the cost of a cup of

coffee per day! You can't lose with this GrowMyHVAC.com Program!! Plus it comes with a 100% money back guarantee!



It's Affordable: The price of a cup of coffee a day!

That's right! You get the best practice whole department training tracks and unlimited expert general manager, service manager, sales manager and operations manager support for the price of a cup of coffee a day.

You can select from one of the (7) GrowMyHVAC.com program department options below.

1. **All 6 GrowMyHVAC.com Training Tracks**

Fee is only \$650 per quarter until end of term (50% Savings). That is only about \$7 per day. See the 7-Step on-line approach for each department at: <http://www.growmyhvac.com/CourseModules.asp?CC=ALL>

2. **Retail Residential HVAC Service Department Training Track**

Fee is only \$75 per month until end of term. See what we deliver at <http://www.growmyhvac.com/webpages.asp?wpid=115>
See the 7-Step on-line approach at:

<http://www.growmyhvac.com/CourseModules.asp?CC=RRS>

the table below recaps the online 7-step sessions and track deliverables.

Retail Residential HVAC Service Department Track	
Step	GrowMyHVAC.com session description
1	RS-STEP #1.0 Fix-Right residential flat rate repair price book set-up
2	RS-STEP #2.0 Marketing residential service for profits
3	RS-STEP #3.0 Proper customer care call handling and dispatching processes
4	RS-STEP #3.1 Priority dispatching and dispatch board set-up
5	RS-STEP #4.0 Professional Technician call handling process
6	RS-STEP #4.1 Service call objective-getting ready-arriving to the call
7	RS-STEP #4.2 Interviewing the customer-setting service call expectations
8	RS-STEP #4.3 Problem diagnosis-informing customer of diagnosis
9	RS-STEP #4.4 Executing the repair, tune-up, or service
10	RS-STEP #4.5 Efficient demand service written service standard procedures
11	RS-STEP #5.0 Stocking service truck inventory for profits
12	RS-STEP #6.0 Daily labor and opportunity conversion performance benchmarking
13	RS-STEP #7.0 Paying Technicians/Tune-up Specialists for Profits
Session deliverables description	
1	Service Call Lead Generation Procedures
2	Professional Service Call Handling Procedures
3	Award winning Fix-Right Flat Rate Repair Upfront Pricing Guide
4	Fix-Right matching Flat Rate Service Invoice
5	Maintenance Agreement Template
6	Program Delivered Right to Your Desktop via On-line 7-Step Training Track
7	Unlimited access to expert consulting and process implementation support

1. **Retail Residential Replacement Department Training Track**

Fee is only \$75 per month until end of term. See what we deliver at

<http://www.growmyhvac.com/webpages.asp?wpid=116>

See the 7-Step on-line approach at:

<http://www.growmyhvac.com/CourseModules.asp?CC=RR>

the table below recaps the online 7-step sessions and track deliverables.

Retail Residential HVAC Replacement Department Track	
Step	CoachNet session description
1	RR-STEP #1.0 Home Comfort replacement packaged pricing book set-up
2	RR-STEP #2.0 Marketing residential replacement for profits
3	RR-STEP #3.0 Professional sales call handling process
4	RR-STEP #3.1 Closing more at higher margins with the "One-Call" Selling process
5	RR-STEP #4.0 Efficient replacement written replacement Standard procedures
6	RR-STEP #5.0 Stocking installation inventory for profits
7	RR-STEP #6.0 Daily labor and opportunity conversion performance benchmarking
8	RR-STEP #7.0 Paying Installers for Profits
9	RR-STEP #7.1 Paying Residential Sales Reps for Profits
	Session deliverables description
1	Equipment Replacement Lead Generation Procedures
2	Professional HVAC Replacement Sales Call Handling and Installation Procedures
3	Equipment Replacement Presentation/Flat Rate Installation Pricing Guide
4	Which HVAC/R Contractor Best Meets Your Needs questionnaire
5	Upfront Replacement Proposal-Agreement Template
6	Program Delivered Right to Your Desktop via On-line 7-Step Training Track
7	Unlimited access to expert consulting and process implementation support

3. Commercial Service Department Training Track

Fee is only \$75 per month until end of term. See what we deliver at

<http://www.growmyhvac.com/webpages.asp?wpid=117>

See the 7-Step on-line approach at:

<http://www.growmyhvac.com/CourseModules.asp?CC=CS>

the table below recaps the online 7-step sessions and track deliverables.

Commercial HVAC Service Department Track	
Step	CoachNet session description
1	CS-STEP #1.0 AccuPro commercial service agreement pricing set-up
2	CS-STEP #1.1 Pricing demand service for profits
3	CS-STEP #2.0 Marketing commercial service for profits
4	CS-STEP #3.0 Proper customer care call handling and dispatching processes
5	CS-STEP #3.1 Priority dispatching and dispatch board set-up
6	CS-STEP #3.2 Professional sales call handling process
7	CS-STEP #3.3 Introduction to the commercial HVAC industry
8	CS-STEP #3.4 Understanding Building Owner/Operator Roles & Responsibilities
9	CS-STEP #3.5 Assessing your company's capabilities and market position
10	CS-STEP #3.6 Service Agreement equipment/systems condition, estimating & pricing
11	CS-STEP #3.7 Qualifying the real, worth and win of a service agreement deal
12	CS-STEP #4.0 Professional Technician call handling process
13	CS-STEP #4.5 Efficient demand service written service standard procedures
14	CS-STEP #4.6 Efficient service agreement written service standard procedures
15	CS-STEP #4.7 Efficient Quoted Repair written service standard procedures
16	CS-STEP #5.0 Stocking service truck inventory for profits
17	CS-STEP #6.0 Daily service labor and opportunity conversion performance benchmark
18	CS-STEP #7.0 Paying technicians for Profits
19	CS-STEP #7.1 Paying commercial sales reps for Profits
Session deliverables description	
1	Service Agreement Lead Generation Procedures
2	Professional Service Agreement Sales Call Handling Procedures
3	AccuPro Commercial/Industrial Service Agreement Pricing Program
4	Professional Service Call Handling Procedure
5	Professional Service Proposal Agreement Templates
6	Program Delivered Right to Your Desktop via On-line 7-Step Training Track
7	Unlimited access to expert consulting and process implementation support

4. **Commercial Design-Build/Project Department Training Track**

Fee is only \$75 per month until end of term. See what we deliver at

<http://www.growmyhvac.com/webpages.asp?wpid=118>

See the 7-Step on-line approach at:

<http://www.growmyhvac.com/CourseModules.asp?CC=CP>

the table below recaps the online 7-step sessions and track deliverables.

Design-Build/Project Department Track	
Step	CoachNet session description
1	CP-STEP #1.0 ProjectPro retrofit/Design Build pricing program set-up
2	CP-STEP #2.0 Marketing retrofit/Design Build for profits
3	CP-STEP #3.0 Professional sales call handling process
4	CP-STEP #3.1 Qualifying the real, worth and win of a project deal
5	CP-STEP #4.0 Efficient retrofit/Design Build written installation procedures
6	CP-STEP #5.0 Stocking project inventory for profits
7	CP-STEP #6.0 Daily labor and opportunity conversion performance benchmarking for
8	CP-STEP #7.0 Paying retrofit/Design Build labor for Profits
9	CP-STEP #7.1 Paying commercial sales reps for Profits
Session deliverables description	
1	Design-Build Lead Generation Procedures
2	Professional Design-Build/Project Sales Call Handling Procedure
3	ProjectPro Commercial/Industrial Retrofit and Design-Build Project Pricing Program
4	Professional Design-Build/Quoted Job Delivery Procedures
5	Professional Project Proposal Agreement Templates
6	Program Delivered Right to Your Desktop via On-line 7-Step Training Track
7	Unlimited access to expert consulting and process implementation support

2. Financial Management Department Training Track

Fee is only \$50 per month until end of term. See what we deliver at

<http://www.growmyhvac.com/webpages.asp?wpid=119>

See the 7-Step on-line approach at:

<http://www.growmyhvac.com/CourseModules.asp?CC=FM>

the table below recaps the online 7-step sessions and track deliverables.

Financial Management Department Track	
Step	CoachNet session description
1	FM-STEP #1.0 Pricing for profits
2	FM-STEP #2.0 Business Performance benchmark set-up
3	FM-STEP #3.0 Invoice and proposal risk and liability protection terms and conditions
4	FM-STEP#4.0 Implementing inventory control procedures
5	FM-STEP #5.0 Implementing collections and accounts receivable procedures
6	FM-STEP#6.0 BudgetPro financial Management and labor forecasting program set-up
7	FM-STEP #7.0 Business Evaluation and Improvement Plan
Session deliverables description	
1	BudgetPro Financial Budget and Labor Forecasting Program
2	On-going Business Evaluation and Improvement Plans
3	Inventory Control Written Standard Procedures and Forms
4	Professional Design-Build/Quoted Job Delivery Procedures
5	Complete Collections/Accounts Receivable Written Delivery Procedures and Forms
6	Program Delivered Right to Your Desktop via On-line 7-Step Training Track
7	Unlimited access to expert consulting and process implementation support

5. **Human Resource Management Department Training Track**

Fee is only \$50 per month until end of term. See what we deliver at

<http://www.growmyhvac.com/webpages.asp?wpid=120>

See the 3-Step on-line approach at:

<http://www.growmyhvac.com/CourseModules.asp?CC=HR>

the table below recaps the online 3-step sessions and track deliverables.

Human Resource Department Track	
Step	CoachNet session description
1	HR-STEP #1.0 Implementing job descriptions and performance evaluations
2	HR-STEP #2.0 Employee hand book set-up
3	HR-STEP #3.0 Recruiting, hiring, training, staffing and deployment
Session deliverables description	
1	Complete Set of Performance Based Job Descriptions and Evaluations
2	Employee Handbook Template
3	Recruiting, Hiring, Training, Staffing, and Deployment Written Delivery Procedures
4	Program Delivered Right to Your Desktop via On-line 7-Step Training Track
5	Unlimited access to expert consulting and process implementation support

FREE HVAC Business Improvement Plan

To quickly help you find your company's unique profit gain opportunities, we provide you with a FREE no-obligation online HVAC Business Improvement Action Plan located on our www.GrowMyHVAC.com home page which you can access by click on the blue link here

<http://www.growmyhvac.com/webpages.asp?wpid=164>

If the on-line 77 questionnaire defaults to “No”, you do not have the process. If your process situation is different, simply click “Yes” or “Not Applicable”.



Upon hitting “Submit” you will receive a 29-page customized Business Improvement Action Plan sent to you as an email PDF attachment.

The Action Plan will include:

1. Where specifically in your business process changes and profit gains exist.
2. What tools you have available in our program to obtain your identified profit gains.
3. What your business's cash engine is worth today.

Upon obtaining your plan you will be contacted to receive a FREE no-obligation 1-hour telephone consultation to help you design a customized improvement strategy to help quickly guide your business towards the earlier discussed 3 key HVAC business success objectives.

We are so sure of our program and its ability to have proven positive results that we include a written 100% absolute money back guarantee! With our guarantee, your financial risk of loss is greater by NOT working with us on your business. All that we

require from your company for this guarantee is that you participate in working on your business with our program.

Enroll today and outperform the competition within 60 days

Since each contracting company is unique in its people, business opportunity mix and goals, our Business Fitness Coaches stand ready to help guide you through all of the program benefits as well as to help you expedite implementation of our proven processes within your business.

Join us today and outperform the competition within 0-60 days.

It is your future. Take charge. Take your HVAC business to the next level. To get started, call us toll free 800-240-2823 to speak with an HVAC Business Fitness Coach today or fax us the 2-page enrollment forms which are located on the very last two pages of the Success Manual.

Staff job training by job title

We are the only Company that provides you with complete proven department processes, forms and individual job training. After each session we contact you with the session handouts and check in with you or your staff to see if any implementation support help is needed.

Below are the individual job training sessions included for all positions in your business. The sessions help you make changes by getting your staff involved and participating in the changes.

Owner/General Manager

All departmental tracks.

Residential Sales Rep. /Sales Manager

RR-STEP #1.0 Home Comfort replacement packaged pricing book set-up

RR-STEP #2.0 Marketing residential replacement for profits

RR-STEP #3.0 Professional sales call handling process

RR-STEP #3.1 Closing more at higher margins with "One-Call" Selling process.

RR-STEP #7.1 Paying Residential Sales Reps for Profits

Commercial Sales Rep/Sales Manager

CS-STEP #1.0 AccuPro commercial service agreement pricing set-up

CS-STEP #1.1 Pricing demand service for profits

CS-STEP #2.0 Marketing commercial service for profits

CS-STEP #3.2 Professional sales call handling process

CS-STEP #3.3 Introduction to the commercial HVAC industry

CS-STEP #3.4 Understanding Building Owner/Operator Roles & Responsibilities

CS-STEP #3.5 Assessing your company's capabilities and market position

CS-STEP #3.6 Service Agreement equipment estimating & pricing

CS-STEP #3.7 Qualifying the real, worth and win of a service agreement deal

CP-STEP #1.0 ProjectPro retrofit/Design Build pricing program set-up

CP-STEP #2.0 Marketing retrofit/Design Build for profits

CP-STEP #3.0 Professional sales call handling process

CP-STEP #3.1 Qualifying the real, worth and win of a design-build/project deal

Dispatcher/Customer Care Manager

RS-STEP #3.0 Proper customer care call handling and dispatching processes

RS-STEP #3.1 Priority dispatching and dispatch board set-up

RS-STEP #4.0 Professional Technician call handling process

CS-STEP #3.0 Proper customer care call handling and dispatching processes

CS-STEP #3.1 Priority dispatching and dispatch board set-up

CS-STEP #4.0 Professional Technician call handling process

Comptroller-Credit Manager

FM-STEP #1.0 Pricing for profits
FM-STEP #2.0 Business Performance benchmark set-up
FM-STEP #3.0 Invoice/proposal risk & liability protection terms and conditions
FM-STEP #4.0 Implementing inventory control procedures
FM-STEP #5.0 Implementing collections and accounts receivable procedures
FM-STEP #6.0 BudgetPro financial and labor forecasting program set-up
FM-STEP #7.0 Business Evaluation and Improvement Plan

Project Estimator

FM-STEP #1.0 Pricing for profits
FM-STEP #3.0 Invoice/proposal risk & liability protection terms and conditions
CP-STEP #1.0 ProjectPro retrofit/Design Build pricing program set-up
CP-STEP #4.0 Efficient Retrofit/Design Build written installation procedures

Residential Service Manager

RS-STEP #1.0 Fix-Right residential flat rate repair price book set-up
RS-STEP #2.0 Marketing residential service for profits
RS-STEP #3.0 Proper customer care call handling and dispatching processes
RS-STEP #3.1 Priority dispatching and dispatch board set-up
RS-STEP #4.0 Professional Technician call handling process
RS-STEP #4.1 Service call objective-getting ready-arriving to the call
RS-STEP #4.2 Interviewing the customer-setting service call expectations
RS-STEP #4.3 Problem diagnosis-informing customer of diagnosis
RS-STEP #4.4 Executing the repair, tune-up, or service
RS-STEP #4.5 Efficient demand service written service standard procedures
RS-STEP #5.0 Stocking service truck inventory for profits
RS-STEP #6.0 Daily labor & opportunity conversion performance benchmarking
RS-STEP #7.0 Paying Technicians/Tune-up Specialists for Profits

Commercial Service Manager

CS-STEP #1.0 AccuPro commercial service agreement pricing set-up
CS-STEP #1.1 Pricing demand service for profits
CS-STEP #2.0 Marketing commercial service for profits
CS-STEP #3.0 Proper customer care call handling and dispatching processes
CS-STEP #3.1 Priority dispatching and dispatch board set-up
CS-STEP #3.2 Professional sales call handling process
CS-STEP #3.3 Introduction to the commercial HVAC industry
CS-STEP #3.4 Understanding Building Owner/Operator Roles & Responsibilities
CS-STEP #3.5 Assessing your company's capabilities and market position
CS-STEP #3.6 Service Agreement equipment estimating & pricing
CS-STEP #3.7 Qualifying the real, worth and win of a service agreement deal
CS-STEP #4.0 Professional Technician call handling process
CS-STEP #4.5 Efficient demand service written service standard procedures
CS-STEP #4.6 Efficient service agreement written service standard procedures
CS-STEP #4.7 Efficient Quoted Repair written service standard procedures

CS-STEP #5.0 Stocking service truck inventory for profits
CS-STEP #6.0 Daily labor & opportunity conversion performance benchmarking
CS-STEP #7.0 Paying technicians for Profits
CS-STEP #7.1 Paying commercial sales reps for Profits

Office Manager

FM-STEP #4.0 Implementing inventory control procedures
FM-STEP #5.0 Implementing collections and accounts receivable procedures

Stock Clerk

FM-STEP #4.0 Implementing inventory control procedures

Book Keeper

FM-STEP #6.0 BudgetPro financial Management & labor forecasting program set-up

Residential Technician

RS-STEP #4.0 Professional Technician call handling process
RS-STEP #4.1 Service call objective-getting ready-arriving to the call
RS-STEP #4.2 Interviewing the customer-setting service call expectations
RS-STEP #4.3 Problem diagnosis-informing customer of diagnosis
RS-STEP #4.4 Executing the repair, tune-up, or service

Commercial Technician

CS-STEP #4.0 Professional Technician call handling process

2-Page Enrollment Forms

READY-BUILT HVAC CONTRACTOR® LICENSE AGREEMENT

Company Name (hereafter "Licensee"):

Address:

Equipment Line:

City:

State:

ZIP:

Phone#:

Fax#:

Email:

AVAILABLE READY-BUILT WEBSITE HVAC DEPARTMENTS

Ready-Built HVAC Website – www.ReadyBuiltHVACWebsites.com

- ✓ Professional service, tune-up & replacement call handling
- ✓ Quick and easy 1-page next day set-up
- ✓ Reliable website hosting
- ✓ 20 email addresses
- ✓ Stand alone or integrated with Ready-Built department service, installation and or work delivery processes and forms

Ready-Built Retail Residential Service Department

- ✓ Service Call Lead Generation Procedure
- ✓ Professional Service Call Handling Procedure
- ✓ Fix-Right Flat Rate Repair Upfront Pricing Guide
- ✓ Flat Rate Service Invoice
- ✓ Maintenance Agreement Template

Ready-Built Retail Residential Equipment Replacement Department

- ✓ Replacement Lead Generation Procedure
- ✓ Professional HVAC Replacement Call Handling and Installation Procedure
- ✓ Equipment Replacement Presentation/Flat Rate Installation Pricing Guide
- ✓ Which HVAC/R Contractor Best Meets Your Needs questionnaire
- ✓ Upfront Replacement Proposal-Agreement Template

Ready-Built Commercial/Industrial Service Department

- ✓ Service Agreement Lead Generation Procedure
- ✓ Professional Service Agreement Sales Call Handling Procedure
- ✓ AccuPro Commercial/Industrial Service Agreement Pricing Program
- ✓ Professional Service Call Handling Procedure
- ✓ Professional Service Proposal Agreement Templates

Ready-Built Design-Build/Project Department

- ✓ Design-Build Lead Generation Procedure
- ✓ Professional Design-Build/Project Sales Call Handling Procedure
- ✓ ProjectPro Commercial/Industrial Project Pricing Program
- ✓ Professional Design-Build/Quoted Job Handling Procedure
- ✓ Professional Project Proposal Agreement Templates

Ready-Built Financial Management Department Training

- ✓ BudgetPro Financial Budget and Labor Forecasting Program
- ✓ On-going Business Evaluation and Improvement Plans
- ✓ Inventory Control Written Standard Procedures and Forms
- ✓ Complete Collections and Accounts Receivable Written Delivery Procedures and Forms

Ready-Built Human Resource Management Department

- ✓ Complete Set of Performance Based Job Descriptions and Evaluations
- ✓ Employee Handbook Template
- ✓ Recruiting, Hiring, Training, Staffing, and Deployment Written Delivery Procedures

Program Delivered Right to Your Desktop via On-line 7-Step Training Track along with unlimited process implementation support

THE KEY TO SUCCESS IS TO TRAIN PEOPLE ON PROCESSES

Learning is a way of life in the Ready-Built HVAC Program. Our methods, policies, and procedures are unique to the best in class contractors in the industry. Today, hiring a walk-in-off-the-street, start-tomorrow-at-full-speed match is unlikely.

We believe that keeping everyone on top of changes in technology, competition, and customer demands is critical to your success and survival.

We have perfected the most efficient means of delivering our best-in-class HVAC whole department process training.

We provide a well-structured, step-by-step, comprehensive set of departmental processes which also doubles as individual job training for each function of the departments work delivery.

Our step-by-step training approach helps avoid information dumping and creates competencies, confidence, commitment to customers and company profitability. Nothing good happens for customers or the company until an employee makes it happen. The best part of our learning system is that the training is available right at their desktops and can be retaken over and over again until mastered.

Depending on the job that needs to be done, we incorporate two kinds of skill training:

1. Technical skills related to process, harvesting opportunities, and work delivery.
2. Customer knowledge based on their expectations for each work category.



License Fee Payment Schedule: In consideration for the grant of license and to enable Licensee to participate in and receive Licensor's Ready-Built HVAC Program intellectual property, associated services and Materials to be provided by Licensor to Licensee, Licensee agrees to pay an amount for the selected program payable monthly interest free commencing upon the Effective Date of this Agreement and continuing for a minimum of (12) months to be received by Licensor at 50 Musket Drive, Nashua, NH 03062.

Term: Commencing on the Effective Date, and continuing for a period of (12) months, Licensor will make available to Licensee the services and materials as hereinafter described. Licensor may terminate this License at any time at its sole discretion. Licensee may terminate Agreement by submitting to Licensor written notice within 60 days prior to end of term. If termination notice is not received from Licensee by Licensor, this Agreement shall extend automatically for an additional 12 month period upon the anniversary date. Licensor reserves the right to terminate this agreement in the unlikely event Licensee has failed to use any of the resources, tools, or training programs.

The parties to this Agreement acknowledge that there are no warranties, representations, covenants, or agreements other than those set forth expressly herein. None of the terms of this Agreement shall be modified except in writing and delivered by the parties.

Licensee acknowledges that Licensee has read this entire Agreement and agrees upon the acceptance by Licensor, this Agreement (including all terms and conditions) will become the binding contract between the parties.

COMPANY NAME: _____

BUILDING SERVICES INSTITUTE, INC.

By _____ **Effective Date:** _____
Licensee Signature

By _____
Licensor Signature

Title

Title

RECITALS

- 1) **The Parties.** This Ready-Built HVAC Program License Agreement (this "Agreement") is made effective as of the above Effective Date between the parties. The parties to this license are Building Services Institute, Inc. ("the Licensor"), and the licensed contractor as identified in this Agreement ("the Licensee"). Licensor owns and provides the Ready-Built HVAC Program's accelerated growth process, the sustained profitability services, the job training, and the support via Licensor's e-learning web based Ready-Built HVAC Program's Department Training Center located at www.GrowMyHVAC.com and its HVAC business processes and portions of the fulfillment services. The Licensee is the contracting company that has executed this Ready-Built HVAC Program License Agreement named above, or permitted to use the facilities of the Licensor.
- 2) **License.** This license applies to Licensor owned copyright, title, trademarks, education and training programs, contractor business products, tools, and business development processes, and all other related rights in and to the Ready-Built HVAC Program entitled "Ready-Built HVAC Dealer Development Program" or the short name "Ready-Built HVAC Program" (hereinafter "Material") published by Licensor for which Licensee has paid the appropriate Licensee fee.
 - a) **Grant of License.** Licensor grants to Licensee the nonexclusive and nontransferable right, during the term of this Agreement, to use the Ready-Built HVAC Website, AccuPro®, AccuTask®, ProjectPro®, BudgetPro®, and Fix-Right® software programs, Home Comfort Certified System® and other Licensor provided promotion campaigns, heating, ventilating, and air conditioning contractor product and service delivery standard operating procedures, trademarks, and Licensor copyright materials, including the electronic spreadsheet, presentations, and word processor templates (collectively hereinafter, "Materials"), in conjunction with Licensor programs and products, for Licensee own use and that of Licensee company. Licensee may use the templates on computer or computers within the Licensee company location identified above, or a single station of a computer network, subject to the following provisions of this Agreement. The Ready-Built HVAC Dealer Development Program resources and the associated materials (other than portions in the public domain) are the property of Licensor and are protected by copyright laws and by international treaties. Any rights not expressly granted in this license are reserved to Licensor.
- 3) **Restrictions.** Licensee may not copy except for authorized installation and backup purposes, distribute, modify, reverse compile, reverse assemble, or create derivative works of Licensor's software, products or templates. Licensee may not rent, lease, license, sell, or give the tools to any person or organization without prior written permission. Licensee agrees to take all reasonable steps to prevent unauthorized transfer or use of the tools.
 - a) Licensee agrees upon termination of this Agreement to stop use of and within ten (10) business days of termination date return all software, products, promotions, or templates to Licensor via certified mail with receipt requested as record of return.
 - b) Licensee agrees to the Ready-Built HVAC Website use and hosting terms and conditions as specified on www.ReadyBuiltHVACWebsites.com.
 - c) Licensor offers the Ready-Built HVAC Program at the contract dollar amount as specified in this agreement and Licensee and Licensor agree the value of the program deliverables to be; 85% of the annual contract dollar amount for the grant of license to Licensee, 5% of the contract dollar amount for the on-going scheduled and unscheduled process support implementation sessions, 5% of the contract dollar amount for the electronic cash management, budgeting, pricing, sales, marketing, operating tools, processes, and associated related forms which are provided as downloads at the completion of each Ready-Built HVAC Program's session, and 5% of the contract dollar amount for the unlimited access to Licensor program.
 - d) LICENSOR FURTHER AGREES AS A CONDITION OF SIGNING THIS AGREEMENT THAT IN THE EVENT THAT LICENSEE SHOULD BE IN POSSESSION OR IN USE OF ANY OF LICENSOR "TOOLS" AFTER DATE OF LICENSEE NOTIFICATION OF TERMINATION, OR IN THE EVENT THAT LICENSEE SHOULD SELL, OR GIVE THE TOOLS TO ANY UNAUTHORIZED PERSON OR ORGANIZATION WITHOUT PRIOR WRITTEN PERMISSION TO PAY LICENSOR AN UNAUTHORIZED USAGE A FEE AMOUNT EQUAL TO THE ANNUAL FEE AMOUNT OF THIS AGREEMENT PER OCCURRENCE.
 - e) LICENSEE FURTHER AGREES IN THE EVENT LICENSOR MUST COMMENCE LEGAL OR PAYMENT COLLECTION ACTION IN ORDER TO RECOVER LICENSOR'S MATERIAL PROPERTY OR ANY AMOUNT PAYABLE UNDER THIS AGREEMENT TO PAY LICENSOR ALL COLLECTION SERVICE FEES ON THE AMOUNTS COLLECTED, AND ALL COURT COSTS AND ATTORNEYS' FEES INCURRED BY LICENSOR. LICENSEE FURTHER AGREES TO PAY A 1½%-PER-MONTH (18% PER ANNUM) DELINQUENCY COST CHARGE AGAINST ALL ACCOUNTS PAST DUE.
- 4) **Suitability, Warranties, and Liability.** Suitability: Licensee must determine the suitability of the tools for the intended uses; no warranties of merchantability or fitness for any specific purpose are either express or implied. No liability for special, incidental, consequential, indirect, or similar damages is assumed by Licensor. The tools may be changed or discontinued at any time, without advance notice. The license is for the present and future versions only; availability, continued support, updates, and compatibility with specific hardware, operating systems, or changes thereto are not assured.
- 5) **Termination.** Upon termination of the Agreement, Licensee right to use the Ready-Built HVAC Program's, promotional collaterals, sales tools, business tools, Materials, products, and software, and or the Microsoft Office based program applications immediately ceases and Licensee must immediately pay Licensor the remaining Ready-Built HVAC Program balance owed to Licensor. After the initial minimum term Licensee agrees to continue to pay the quarterly license fee to Licensor per the terms of this Agreement until such time Licensee returns Licensor property, programs, promotional collaterals, materials, products, and pricing programs.
- 6) **Confidentiality.** Licensee acknowledges and agrees that the materials, sales aids, audio visual materials, promotional information and materials, forms, lists, agreements, systems, computer programs and all other materials and training aids provided or developed by Licensor pursuant to this Agreement, as well as the content of any training programs and consulting services are the property of Licensor and must be held in strictest confidence by Licensee. Licensee agrees to instruct its employees as to the confidential nature of all such matters and will invoke rules and systems, as necessary, to ensure that the confidentiality is protected.
- 7) **Relationship of Parties.** It is acknowledged and agreed by Licensor and Licensee that both parties remain independent contractors, for all purposes hereunder. Licensor shall have no authority, express or implied, to manage or control, directly or indirectly, any of the business operations of Licensee.
- 8) **Governing Law.** As a condition of executing this License, both parties further agree that any legal action taken or to be taken by either party regarding this Agreement or the rights and liabilities of Licensor or Licensee hereunder shall be brought only before a federal, state or local court of competent jurisdiction located within the State of New Hampshire. Licensee hereby consents to, and agrees not to contest, the jurisdiction of the federal, state and local courts located within the State of New Hampshire.
- 9) **Execution.** The parties hereby agree that this Agreement may be executed in two or more counterparts and by facsimile, each of which shall be deemed an original and all of which together constitutes one and the same instrument. Photocopies or fax copies of the original Agreement shall be deemed to be duplicates of the originals. Licensee agrees that they have read and agree to all terms and conditions and as evidenced by their signature on both pages of this Agreement.
- 10) **Money Back Guarantee.** Licensor offers a *Money Back Guarantee* on its Ready-Built HVAC Program. Licensor agrees that if Licensee at the end of the original term of this Agreement and as a result of Licensor methods and or programs does not achieve new gross profit margin contribution by an amount equal to or above the amount paid by Licensee to Licensor under this Agreement, Licensor will reimburse the difference of the Ready-Built HVAC Program fees Licensee paid to Licensor under this Agreement. Licensor makes the Money Back Guarantee on the following conditions:
 - a) Licensee agrees to submit to Licensor within (60) business days of the Effective Date of this Agreement Licensee's previous twelve (12) month period Income and Expense statements ("Operating Benchmarks") for Licensee company HVAC operating departments for period up to the Effective date of this License Agreement and to submit to Licensor Licensee's last (12) months to end of Agreement term Income and Expense statements for Licensor comparison to Licensee's Operating Benchmarks of Ready-Built HVAC Program financial performance.
 - b) Licensee has demonstrated that they have implemented within (60) days of executing this Agreement and continuing throughout the full term of this Agreement by attending and implementing 100% of Licensor's complete Ready-Built HVAC Program's department sessions and tools.

11)

Authorization Agreement for Credit Card

Card Holder Name: (Print)✱

Card Holder Address: (Print)✱

City: (Print)✱

State:✱

ZIP:✱

✱ (Please Selected Program Check Box ☒) Visit www.GrowMyHVAC.com & www.ReadyBuiltHVACWebsites.com to review training session and best practice HVAC website.

- ☐ Ready-Built Website, Hosting & All 6 Departments fee amount \$295 per month until end of term.
- ☐ Ready-Built Website, Hosting & Residential Service & Install Departs fee amount \$210 per month until end of term.
- ☐ Ready-Built Website, Hosting & Commercial Service & Des-Bld Departs fee amount \$210 per month until end of term.
- ☐ Ready-Built Residential Service & Install Departs fee amount \$149 per month until end of term.
- ☐ Ready-Built Commercial Service & Design-Build Departs fee amount \$149 per month until end of term.
- ☐ Ready-Built All 6 Departments fee amount \$225 per month until end of term.
- ☐ Ready-Built Website, Hosting fee amount \$99 per month until end of term.

I (we) hereby authorize Building Services Institute to initiate entries to my (our) credit card account.

✱Check: AMEX ☐ MasterCard ☐ Visa ☐

✱3-digit security code located on the back

✱Credit Card #:

✱Expiration Date

This authorization is to remain in full force and effect per the terms of this agreement. In such events where more than one payment is owed by Licensee to Licensor, this authorizes Licensor to increase Licensee payment up to the full amount due to Licensor.

✱Authorized Signature:

✱Date:

✱Required fields. Please fax the entire executed Agreement to: 603-386-6342

*Ready-Built Program transactions will be recorded on your bank statements as from Building Services Institute