

**THE ULTIMATE  
HVAC PLUMBING  
& ELECTRICAL  
CONTRACTOR**

**2021**

2016

# User Guide

**Access to whole department business systems  
Fast financial & labor management & controls**

Learn how to implement the THE ULTIMATE HVAC PLUMBING & ELECTRICAL CONTRACTOR retail residential, commercial service, human resource management and financial management subscribers available lead generation, marketing, surveying, estimating, pricing, selling, delivery processes for HVAC repair, maintenance, replacement or design- build/project services in your area.

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# WELCOME ABOARD

## WELCOME TO READY-BUILT HVAC CONTRACTOR PROGRAM - USER GUIDE

Welcome to the Ready-Built HVAC Contractor™ User Guide. This online Ready-Built HVAC Contractor program is designed to provide you with Retail Residential and Commercial Service HVAC business systems, processes and forms for the entire business operating processes. Ready-Built HVAC provides defined operating company standards, processes & forms and staff job & implementation training that is typically only included in a very costly HVAC Business “franchise” and does everything BSI’s onsite implementation version does, but is delivered 100% online LIVE and pre-recorded for FAST business transformation in a tenth of the time and less than (1) 100th of the cost.

How good is our program? Our HVAC client’s base includes past and current “franchisee” Owner/Manager clients.

The Ready-Built HVAC Contractor program is designed to help you FAST TRACK to more profitability!

**IMPORTANT ONLINE COMMUNICATION NOTICE:** This program is delivered and supported 100% online. The email address you subscribed with and subsequent staff email addresses provided is the preferred means of communicating to you our website, price guide set-up forms, receiving Ready-Built HVAC Program Business Process Implementation GoToMeeting support invites, training session instruction sets, and or for you to request from us any program use and implementation support.

For immediate response, you may directly email your business fitness coach’s email address provided or his direct phone number provided to you per our “welcome aboard email” sent to upon your subscription and to your subscriber email address provided on your Ready-Built HVAC License Agreement, or if you can’t find, simply contact us through our EMAIL HOT LINE [info@GrowMyHVAC.com](mailto:info@GrowMyHVAC.com) or 603-556-1611.

## WHO WE ARE AND WHAT MAKES US DIFFERENT?

**OUR TARGET AUDIENCE:** The Average HVAC Contractor makes ONLY 2.3% net profit before taxes, and 10% of ALL HVAC companies experience serious cash flow problems, poor customer and employee retention problems, and some even suffer business failure each year. Our clients find that the biggest contributor to poor profitability is an absence of defined business operating systems, processes/forms and or daily labor management.

### Sources:

- US Census Bureau
- E-Myth, Contractor
- Distributor Sales & Collection Records
- Client Performance Interviews

**WHO SHOULD SUBSCRIBE?** Those who wish to own or manage any aspect of a successful HVAC business are most interested in the FAST START the Ready-Built HVAC Contractor Program provides through online delivery of complete HVAC business operating systems, management and

staff training, process implementation & transformation assistance to best practice, and business support & coaching. The online sessions are also packaged to provide expert job training for the below management, marketing, pricing, selling, administrative, operation, labor management, work delivery management, human resource management, financial management, to include:

#### GENERAL MANAGER/OFFICE JOB TRAINING TRACKS

- Owner/General Manager
- Human Resource Manager
- Financial Manager
- Comptroller-Credit Manager
- Office Manager
- Stock Clerk
- Book Keeper

#### RESIDENTIAL JOB TRAINING TRACKS

- Residential Service Manager
- Residential Sales Manager
- Residential Marketing Manager
- Residential Installation Manager
- Residential Installer
- Residential Marketing Manager

- Dispatcher/Customer Care Manager
- Residential Technician
- Residential Selling Technician
- Residential Crew Chief
- Comfort Advisor

#### COMMERCIAL JOB TRAINING TRACKS

- Commercial Service Manager
- Commercial Sales Manager
- Comm. Marketing Manager
- Commercial Service Agreement Sales
- Commercial Design-Built Sales Consultant
- Dispatcher/Customer Care Manager
- Project Estimator
- Tech Rep Estimator
- Commercial Technician
- Commercial Installer

**WHY WE ARE UNIQUELY QUALIFIED TO PROVIDE THIS SERVICE?** Our clients are reporting that our Ready-Built HVAC Contractor Program's best practice website, bi-monthly blogging, social media connections, home page for each city and town they serve, and our online compete HVAC departmental tracks are fueling their business success, even in these recessionary times. It is all powered by GrowMyHVAC.com's online job training center a division of BSI with a 15+ year history of success in HVAC contractor business development, owner & staff professional development, and staff job training & education. We invite you to call this month's featured client testimonials by simply clicking [here](#).

#### WHAT'S IN IT FOR YOU?

We know what HVAC Contractors clients need in their businesses to be successful. In a market that seems to get more challenging every year, you need tools, proven business processes, work delivery forms and strategies to increase lead conversion rates and decrease the time dedicated to serving customers. **In fact, we not only can offer you the lowest cost way to do both, and with a 100% guarantee to your Success!**

*"OUR AVERAGE SERVICE REPAIR AND INSTALLATION TICKETS HAVE GONE UP 166% AND WITH NO INCREASE IN PRICING COMPLAINTS. NICE!!"*

**DENNIS CLARK**  
PHOENIX COMFORT SYSTEMS, KY

Online education has grown tremendously over the past ten years. The increased accessibility of the

internet and the World Wide Web has created vast opportunities for non-traditional HVAC business education. The explosion of technology has also made HVAC business teaching outside the traditional classroom possible and has also provided HVAC staff with easy access to HVAC business systems, processes and related course material. **IT IS THE ONLINE READY-BUILT HVAC BUSINESS TRAINING CENTER ADVANTAGE!**

We are so sure of our proven Ready-Built HVAC Contractor program and its ability for fast positive revenue and profit results, that we include a written 100% money back guarantee our subscription! In fact, all that we require for this guarantee is that you and your staff participate in the *Ready-Built HVAC Contractor* business growth subscription program.

How can we uniquely offer this kind of a financial guarantee you ask? The simple truth is, we are so inexpensive and the typical profit gains huge that we easily 100% guarantee your success! In fact, were are priced for a 1-truck company client who are easily making an extra \$68 through GrowMyHVAC.com or for \$52 through best out of 7 HVAC wholesaler and manufacturing distributor partners dealer/client programs on their very first call of any week to recover cost of even our most expensive program subscription then they are NOT participating.

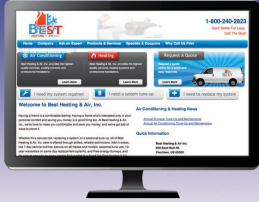
## **WHY THE READY-BUILT HVAC CONTRACTOR WORKS?**

We customize a growth plan to your unique business needs. The Ready-Built Client Solutions Online Business Training Center's online education offers you more than just HVAC business-focused programs on your terms.

We give you the control to schedule your business improvement work. There are no job interruptions, travel expenses, or hours spent searching the campus map. You and your staff can attend classes anytime, anywhere 24/7. See our Training Center at [www.GrowMyHVAC.com](http://www.GrowMyHVAC.com).

## **THIS DOCUMENT IS YOUR READY-BUILT HVAC CONTRACTOR USER GUIDE.**

You may contact your assigned business fitness coach on his direct line, email or text him as found on the *Welcome Aboard* email growth strategy session GoToMeeting invite he sent you upon your subscription enrollment. Please do not hesitate to contact him at any time, or if you misplaced his contact information email then email our hot line [info@GrowMyHVAC.com](mailto:info@GrowMyHVAC.com) or call us 800-240-2823 for a private GoToMeeting demo on any aspect of our Ready-Built HVAC Contractor program.



# Ready-Built HVAC Website/Social Media TRANSFORMATION PLAN

## Pass out your business card to thousands of potential clients TODAY!

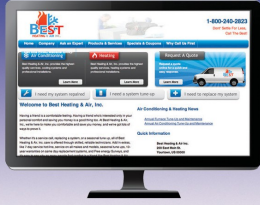
Within 3 business days of client submission of completed 1-page Website Set-up Form, we get you online with a professional internet storefront website and help guide you to establish a local professional presence for your HVAC services.

Client Business Benefit Objectives: (as reported by our enrolled clients)

- **Cost Effective Lead Generation:** Lowest cost means to pass out your company's business card 24/7 to 8 out of 10 buyers who go online to buy your service.
- **Present a Professional Image:** Your professionally designed HVAC website is a great way of instilling confidence and looking bigger than you may be. Your primary competitors may already have a presence on the Internet. Your website should allow you to show consumers that you are simply better.
- **Improve Customer Service:** Your online forms should allow customers to request quotations or ask for more information.
- **Gather Information and Generate Valuable Leads:** Rather than going out and getting leads, let them come to you.
- **Provide Instant Gratification:** People are busy and don't like to wait for information. Give them what they want, when they want it.
- **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.

During week #1:

1. We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.
2. Upon completion of session, Business Fitness Coach will send you a 1-page Website Set-up Form for you to download, complete, fax/scan, and send back to us for configuring and prepare for going online with your Website.
3. Client is notified when to redirect client's Website URL address's to our Server#1 and Server #2 server's addresses.
4. Client is also provided a password to access his Website's "Administration Portal" to post his own blogs, set up specials, and create home pages for each city/town he serves, and link his website to his Facebook and/or Twitter accounts.
5. Client is encouraged to enhance his website's local presence by downloading and following the Ready-Built HVAC Website User Guide Appendix section to create inbound links from search engine approved directories and social media sites.
6. Client is also given permission, during his active Ready-Built subscription, to copy and paste our website bi-monthly blogs to his other social media sites.



# Retail Residential Service Department Business Systems TRANSFORMATION PLAN

## Professionalize Your Residential Service Operations TODAY!

Within 4 weeks of start date, your Business Fitness Coach helps you establish the following business systems:

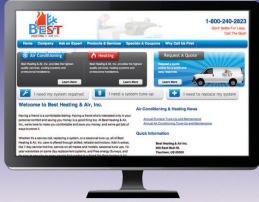
- **Service Call Lead Generation Procedure**
- **Professional Service Call Handling Procedure**
- **Fix-Right Flat Rate Repair Upfront Pricing Guide**
- **Flat Rate Service Invoice**
- **Maintenance Agreement and Selling Process**
- **Truck Stock Inventory Control.**

Client Business Benefit Objectives: (as reported by our enrolled clients)

- **Close 2 out of 10 service calls to an accessory add-ons and or additional quoted work.**
- **Close 8 out of 10 non-service agreement customer repair calls to a sold service agreement.**
- **Close 8 out 10 catastrophic service repairs to a sold replacement job.**
- **99% error free repairs resulting in 99%+ reduction in costly call backs.**
- **400% increase in quoted jobs/replacements using call handling harvesting process.**
- **Average 2.25+ hours per residential repair call by adhering to best-practice repair pricing in compliance with published consumer and safety standards.**
- **Implement our written best-practice service-truck stock and restocking program.**
- **Deliver consistent quality on all residential demand service work per our written, best-practice demand service standard operating procedures.**

During week #1:

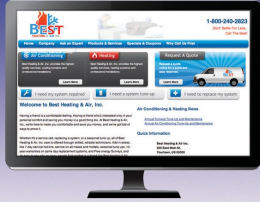
- 1. We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.**
- 2. Upon completion of session, Business Fitness Coach registers you and your staff to access online business process and implementation training sessions.**
- 3. Upon completion of session, Business Fitness Coach will send you the next week's Growth Strategy Session Workout meeting invite.**



# Retail Residential Service Department Business Systems TRANSFORMATION PLAN

4. Upon completion of session, Business Fitness Coach will send you a 1-page Fix-Right Flat Rate Service Repair Setup Form for you to download, complete, fax/scan, and send back to us for configure your residential Fix-Right service repair pricing.
5. Upon completion of session, Business Fitness Coach will send you which online sessions to take to obtain a complete service repair call handling system, to include customer system diagnostic forms, example flat rate service repair invoices, residential service agreements, and staff performance based pay.
6. You or your Service Manager, Dispatcher/Receptionist and Technician staff will simply go to our Online Solution Center home page, click top right “Client Login” to access these training tracks: (4-Dark blue session for dispatchers/receptionists) (4 – Dark green for technicians – can also be delivered live by coach)
  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 service call handling process
  6. RS-STEP #4.1 Technician Service Call Handling Soft Skills for Proper Customer Communications
  7. RS-STEP #4.2 Service call objective-getting ready-arriving to the call
  8. RS-STEP #4.3 Interviewing the customer and setting service call expectations
  9. RS-STEP #4.4 Problem diagnosis-informing customer of diagnosis
  10. RS-STEP #4.5 Executing the repair, tune-up, or service
  11. RS-STEP #4.6 Efficient demand service written standard procedures
  12. RS-STEP #5.0 Stocking service truck inventory for profits
  13. RS-STEP #6.0 Daily labor and opportunity conversion performance benchmarking
  14. RS-STEP #7.0 Paying Technicians/Tune-up Specialists for Profits
7. For our next meeting, client tries to complete and print out the following technician handouts:
  1. Order “Invoices”, “Protect Service Agreement” and the “System Condition Report” from our preferred print vendor.
  2. Print out 1 copy per technician the Fix-Right Flat Rate Service Repair Price Guide.
  3. Download the RESCALC.xls file and estimate your annual service agreement price for 1 and 2 inspections service agreements. To obtain monthly service agreement pricing you divide the annual prices by 12. See session RS-1.0
  4. Dispatchers print out and edit the Professional Call Handling Script and present to Service Manager for approval. See session RS-3.0
  5. Print out 20 copies each per Technician of the 1-page “Service-Right System Diagnostic Form” to be used by technician on all service calls – See session RS-4.1
  6. Print out 1 copy per Technician of the “Service-Right Customer Awareness Handout” and have it laminated front and back of each page and spiral bound to hand out to customer during walkthrough – See session RS-4.2
  7. Print out 20 copies per each Dispatcher of the “Daily Call Tracker” to be used to debrief Technicians/ Installers at end of call, job or end of day if not finished. See RS-6.0
  8. Print out and read for next meeting the Technician Performance Based Pay Plan – See RS-7.0





# Retail Residential Service Department Business Systems TRANSFORMATION PLAN

## During week #2:

8. For this next meeting, Business Fitness Coach will demo with management and get their approval on which of our Service Department Company Standards to help you implement.
9. We confirm which processes are to be implemented.
10. Upon completion of this session, Business Fitness Coach will send you the next week's Growth Strategy Session Workout to be conducted with Dispatchers/Technicians meeting invite.

## During week #3:

11. For this next meeting, Business Fitness Coach will demo with the approved Professional Service Call Handling Processes and forms, repair and service agreement pricing methods, performance based pay, as well as, post call debriefing.
12. We clarify any questions and confirm Dispatchers/Technicians understanding of your Company Service Standards to be implemented.
13. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.
  - If you have enrolled in all 6 Departments, you also have our Human Resource Management Business Systems and therefore Business Fitness Coach schedules a meeting to implement our Performance Based Job Descriptions for your Service Manager, and Dispatchers/Technicians to tie them to your newly implemented Service Department Company Standards.

## During week #4:

14. For this next meeting, Business Fitness Coach will discuss how best to set up your service truck stock inventory, control processes, and forms. See session RS-5.0.
15. Business Fitness Coach will discuss the implementation of demand service and service agreement written work delivery standards. See session RS-4.5.
16. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.

## Performance Review Meetings:

17. We recommend that you schedule periodic Service Department reviews with your Business Fitness Coach to enable operational adjustments to help you to continue to meet your above Client Business Benefit Objectives.



# Retail Residential Installation Department Business Systems TRANSFORMATION PLAN

## Professionalize Your Residential Replacement Operations TODAY!

Within 4 weeks of client start date, Business Fitness Coach helps establish the following business systems:

- Replacement Lead Generation Procedures
- Professional HVAC Replacement Sales Call Handling Procedures
- Which HVAC/R Contractor Best Meets Your Needs questionnaire
- Upfront Replacement Proposal-Agreement and Selling Process
- Professional HVAC Replacement Sold Job Booking, Mobilization, and Installation Procedures
- Job Stock Inventory Control

Client Business Benefit Objectives: (as reported by our enrolled clients)

- Close 2 out of 10 sales calls to a sold accessory add-ons, or additional quoted work.
- Close 6 out of 10 Request for Quote sales calls to a sold replacement using the “One-Call Close” selling system.
- Close 8 out 10 catastrophic repair calls to a sold replacement on using the “One-Call Close” selling system.
- 99%+ error free replacement installation by implementing our proper replacement opportunity assessment, upfront pricing, sold job booking, as well as, our proper installation mobilization, work delivery execution, startup, test and verification, and daily job completion status reporting processes.
- Implement our written best-practice service-truck stock and restocking program.
- Deliver consistent quality on all residential replacement installation work per our written best-practice installation standard operating procedures.

During week #1:

1. We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.
2. Upon completion of session, Business Fitness Coach registers you and your staff separately to access online training sessions.
3. Upon completion of session, Business Fitness Coach will send you the next week’s Growth Strategy Session Workout Meeting invite.
4. Upon completion of session, Business Fitness Coach sends you a 1-page Home Comfort Certified System Flat Rate Replacement Pricing Set-up Form for you to download, complete and fax/scan and send back us for configuring per your financial requirements for your residential service repair pricing.



# Retail Residential Installation Department Business Systems TRANSFORMATION PLAN

5. Upon receipt of your “Home Comfort Certified System Set-up Form”, your Business Fitness Coach will request you provide, as an email attachment, your equipment vendor equipment pricing for us to import into your “Home Comfort Certified System Flat Rate Replacement Price Guide”.
6. Upon completion of session, Business Fitness Coach will send you an email of what online sessions to take on our Client Solution Center to obtain our complete residential replacement installation price guide, professional service and sales call handling procedures, customer & system diagnostic forms, replacement proposal agreement, performance based pay, booking, mobilization, and installation delivery system.
7. You, your Installation Manager and your Selling Technicians/Comfort Advisors staff will simply go to our Online Solution Center home page, click top right “Client Login” to access these training tracks: (2 – Dark blue sessions are for your selling technicians/comfort advisors)
  1. RR-STEP #1.0 Home Comfort Replacement Flat Rate Pricing Guide Set-up
  2. RR-STEP #2.0 Marketing Residential Replacements for Profits
  3. RR-STEP #3.0 Professional Sales Call Handling Process
  4. RR-STEP #3.1 Closing more at higher margins with the with the “One-Call” Selling Process
  5. RR-STEP #4.0 Efficient written standard procedures for replacements
  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 Crew Chiefs/Installers for Profits
  9. RR-STEP #7.1 Paying Replacement Salespeople for Profits
8. For our next Growth Strategy Workout Session Meeting, client tries to complete and print out the following technician handouts:
  1. Order “Install-Right Proposal Agreement” from our preferred print vendor.
  2. Print out 1 per Selling Technician/Comfort Advisor the “Home Comfort Certified System” Flat Rate Installation Price Guide.
  3. Print out 20 of the 1-page “Install-Right System Diagnostic Form” to be used by selling techs and comfort advisors on all sales calls – See RR-3.0
  4. Print out 20 of the 2-page “Which Contractor Best Meets Your Needs” questionnaire. See RR-3.0.
  5. Print out and review for our next meeting the “Sold Job Booking Approval”, “Work Order Instructions”, “Start-up, Test and Verification” and “Customer Satisfaction Survey” Forms – See RR-4.0
  6. Print out and read for our next meeting the “Crew Chiefs/Installers Performance Based” Pay Plan – See RR-7.0
  7. Print out and read for our next meeting the “Selling Tech/Comfort Advisor Performance Based” Pay Plan – See RR-7.1

## During week #2:

9. For this next meeting, Business Fitness Coach will demo with management and get their approval on which Installation Department Company Standards to have us help you implement.
10. Upon completion of this session, Business Fitness Coach will send you the next week’s Growth Strategy Session Workout to be conducted with selling technicians/comfort advisors meeting invite.



# Retail Residential Installation Department Business Systems TRANSFORMATION PLAN

## During week #3:

- 11. For this next meeting, Business Fitness Coach will demo to your Selling Technicians/Comfort Advisors your approved Home Comfort Replacement Price Guide, pricing methods, the professional sales call handling process & forms, installation proposal agreement, performance based pay, as well as, post call debriefing to identify sales opportunity conversion rates versus expectations.**
- 12. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.**
- 13. However, if you have enrolled in all 6 Departments, you also have our Human Resource Management Business Systems and therefore your Business Fitness Coach will schedule the meeting to implement our Performance Based Job Descriptions for your Installation Manager, Dispatchers, Selling Technicians/Comfort Advisors, and Installers to tie them to your Installation Department Company Standards.**

## During week #4:

- 14. For this next meeting Business Fitness Coach will discuss how best to set up your replacement job stock inventory control processes and forms. See session RS-5.0.**
- 15. We also discuss the implementation of replacement installation written work delivery standards. See session RR-4.0.**
- 16. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.**

## Performance Review Meetings:

- 17. We recommend that you schedule periodic Installation Department reviews with your Business Fitness Coach to enable operational adjustments to help you to continue to meet your above Client Business Benefit Objectives.**



# Commercial Service Department Business Systems TRANSFORMATION PLAN

## **Professionalize Your Commercial Service Operations TODAY!**

Within 4 weeks of client start date Business Fitness Coach helps establish the following business systems:

- **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 and Selling Process**
- **Truck Stock and Service Agreement Inventory Control**

Client Business Benefit Objectives: (as reported by our enrolled clients)

- **Obtain and implement targeted commercial list along with an effective business-to-business and outbound calling lead generation program.**
- **Close 6 out of 10 service agreement sales calls to a sold service agreement using the “One-Call Close” selling system.**
- **To obtain and implement proper commercial service agreement sales presentation, opportunity assessment form, AccuPro estimating, pricing and best-in-class commercial service agreement proposal documents for all HVAC systems categories.**
- **To obtain and implement proper commercial service agreement mobilization, maintenance delivery tasking and post call client performance reporting.**
- **Average 3.25 hours per commercial repair call by adhering to best-practice equipment repairs in compliance with published equipment manufacturers guidelines, industry and safety standards.**
- **Implement our written best-practice service-truck stock restocking and service agreement inventory control program.**
- **Deliver consistent quality on all commercial demand service work per our written demand service standard operating procedures.**
- **Deliver consistent quality on all commercial service agreement work per our written commercial service agreement standard operating procedures.**



# Commercial Service Department Business Systems TRANSFORMATION PLAN

## During week #1:

1. **We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.**
2. **Upon completion of session, Business Fitness Coach registers you and your staff to access online business process and implementation training sessions.**
3. **Upon completion of session, Business Fitness Coach will send you the next week's Growth Strategy Session Workout meeting invite.**
4. **Upon completion of session, Business Fitness Coach will send you a 1-page Fix-Right Flat Rate Service Repair Setup Form for you to download, complete, fax/scan, and send back to us for configuring per your financial requirements for residential service repair pricing.**
5. **Upon completion of session, Business Fitness Coach will send an email advising of which online sessions to take on our Client Solution Center to obtain our complete service call handling system, customer and system diagnostic forms, example flat rate service repair invoices, residential service agreements, and staff performance based pay.**
6. **You, your Service Manager, Commercial Sales Rep, and Dispatcher/Receptionist staff will simply go to our Online Solution Center home page, click top right "Client Login" to access these training tracks: (3-Dark blue session for dispatchers/receptions) (8 – Dark green for commercial sales reps)**
  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 service sales call handling process**
  7. **CS-STEP #3.3 Closing more service agreements at higher margins**
  8. **CS-STEP #3.4 Understanding Building Owner-Operator Roles & Responsibilities**
  9. **CS-STEP #3.5 Assessing Your Company**
  10. **CS-STEP #3.6 Surveying Service Agreement Equipment-System Maintenance Requirements**
  11. **CS-STEP #3.7 Qualifying the real, worth and win of a service agreement deal**
  12. **CS-STEP #4.5 Efficient demand service written service standard procedures**
  13. **CS-STEP #4.6 Efficient service agreement written service standard procedures**
  14. **CS-STEP #4.7 Efficient Quoted Repair written standard procedures**
  15. **CS-STEP #5.0 Stocking service truck inventory for profits**
  16. **CS-STEP #6.0 Daily labor and opportunity conversion performance benchmarking**
  17. **CS-STEP #7.0 Paying Technicians/Tune-up Specialists for Profits**
  18. **CS-STEP #7.1 Paying commercial Sales Reps for Profits**
7. **For our next meeting, client completes and prints out the following technician handouts:**
  1. **Order the "System Condition Report" from our preferred print vendor. See session CS-1.0.**
  2. **Download "AccuPro" commercial service agreement estimating and pricing survey, proposal documents, "Customer and Equipment Assessment Forms", the "AccuTask" technician maintenance tasking procedures. See session CS-1.0.**



# Commercial Service Department Business Systems TRANSFORMATION PLAN

3. **Order commercial B2B owner occupied call list from our preferred list Broker. See session CS-2.0.**
4. **Download commercial service agreement sales “Warm Call Script” and “Commercial Selling Questions that Sell”. See session CS-2.0.**
5. **Download and edit your company’s Commercial Line Card, Prospecting Strategies, and Target Marketing Letters. See session CS-2.0.**
6. **Dispatchers print out and edit the Professional Call Handling Script and present to Service Manager for approval. See session RS-3.0**
7. **Download and review the “Mobilizing the Field Service and Dispatch Function”. See session CS-3.1.**
8. **Download and edit “Commercial Service Agreement 1st Call PowerPoint Presentation”. See session CS-3.2.**
9. **Download and review the “Benefits of Maintenance Agreements”, “Customer and Equipment SurveyForms”. See session CS-3.2.**
10. **Download and review “Introduction to the Commercial HVAC/R Industry”. See session CS-3.3.**
11. **Download and review “Understanding Building Owner/Operator Roles & Responsibilities”. See session CS-3.4.**
12. **Download and review “Assessing Your Company’s Capabilities and Market Position”. See session CS-3.5.**
13. **Download and review “Equipment/Systems and Visual Condition Evaluation Techniques”, as well as, “HVAC/R System Surveying and Equipment Data Gathering.” See session CS-3.6.**
14. **Download and review “Qualifying the Real, Worth and Win of Deal Opportunities”. See session CS-3.7.**
15. **Print out 20 copies per each Dispatcher of the “Daily Call Tracker” to be used to debrief Technicians/ Installers at end of call, job or end of day if not finished. See RS-6.0**
16. **Print out and read for our next meeting the “Technicians Performance Based Pay Plan” – See CS-7.0**
17. **Print out and read for our next meeting the “Commercial Sales Reps Performance Based Pay Plan” – See CS-7.1**

## During week #2:

8. **For this next meeting, Business Fitness Coach will demo with management and get their approval on which of our Service Department Company Standards to have implemented.**
9. **We confirm which processes are to be implemented.**
10. **Upon completion of this session, Business Fitness Coach will send you the next week’s Growth Strategy Session Workout to be conducted with Dispatchers/Technicians meeting invite.**

## During week #3:

11. **For this next meeting, Business Fitness Coach will demo with the Dispatchers/Technicians your approved Professional Service Call Handling Processes and forms, repair and service agreement pricing methods, performance based pay, as well as, post call debriefing to identify labor productivity and service sales opportunity conversion rates versus expectations.**
12. **For this next meeting, Business Fitness Coach will demo with the Commercial Service Agreement Sales Rep your approved Professional Sales Call Handling Processes and forms and service agreement pricing methods, performance based pay, as well as, post call debriefing to identify sales opportunity conversion rates versus expectations.**



# Commercial Service Department Business Systems TRANSFORMATION PLAN

13. We clarify any questions and confirm Dispatchers/Technicians understanding of your Company Service Standards to be implemented.
14. We clarify any questions and confirm Commercial Service Sales Rep understanding of your Company Service Agreement Standards to be implemented.
15. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.
  - If you have enrolled in all 6 Departments, you also have our Human Resource Management Business Systems and therefore the Business Fitness Coach schedules a meeting to implement our Performance Based Job Descriptions for your Service Manager, Dispatchers/Technicians and Commercial Sales Reps to tie them to your newly implemented Service Department Company Standards.

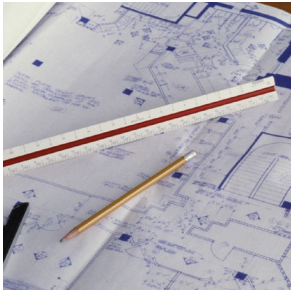
#### During week #4:

16. For this next meeting, Business Fitness Coach will discuss how best to set up your service truck stock and service agreement inventory, control processes, and forms. See session RS-5.0.
17. Business Fitness Coach will discuss the implementation of demand service written work delivery standards. See session RS-4.5.
18. Business Fitness Coach will discuss the implementation of service agreement written work delivery standards. See session RS-4.6.
19. Business Fitness Coach will discuss the implementation of quoted service job written work delivery standards. See session RS-4.7.
20. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.

#### Performance Review Meetings:

21. We recommend that you schedule periodic Service Department reviews with your Business Fitness Coach to enable operational adjustments to help you to continue to meet your above Client Business Benefit Objectives.





# Design/Build Project Department Business Systems TRANSFORMATION PLAN

## Professionalize Your Design-Build/Project Operations TODAY!

Within 4 weeks of client start date Business Fitness Coach helps establish the following business systems:

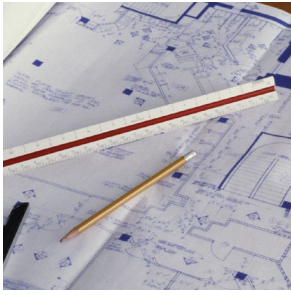
- **Design-Build Lead Generation Procedure**
- **Professional Design-Build/Project Sales Call Handling Procedure**
- **ProjectPro Commercial/Industrial Project Pricing Program**
- **Professional Design-Build/Quoted Job Handling Procedure**
- **Professional Project Proposal Agreement and Selling Process**
- **Project/Job Inventory Control Process**

Client Business Benefit Objectives: (as reported by our enrolled clients)

- **Obtain and implement targeted design-build/project list along with an effective business-to-business and outbound calling lead generation program.**
- **6 out of 10 design-build/project request for quote sales calls converted to a sold job using the “One-Call Close” selling system.**
- **Increase project close rates of 35% or more.**
- **To obtain and implement proper commercial design-build/project sales presentation, opportunity assessment form, ProjectPro estimating, pricing and best-in-class project proposal documents for all your negotiated HVAC project categories.**
- **To obtain and implement proper design-build/project mobilization, installation delivery tasking and post call or end of day job completion status and financial performance reporting.**
- **Average 42% sold job gross profit margin by adhering to best-practice equipment replacement of project installation compliance with published equipment manufacturers guidelines, industry and safety standards.**
- **Implement our written best-practice project stock inventory control program.**
- **Deliver consistent quality on all design-build/project work per our written project standard operating procedures.**

During week #1:

1. **We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.**
2. **Upon completion of session, Business Fitness Coach registers you and your staff to access online business process and implementation training sessions.**



# Design/Build Project Department Business Systems TRANSFORMATION PLAN

3. Upon completion of session, Business Fitness Coach will send you the next weeks' Growth Strategy Session Workout meeting invite.
4. Upon completion of session, Business Fitness Coach will send you a 1-page Fix-Right Flat Rate Service Repair Setup Form for you to download, complete, fax/scan, and send back to us for configuring per your financial requirements your residential service repair pricing.
5. Upon completion of session, Business Fitness Coach will send an email advising of which online sessions to take on our Client Solution Center to obtain our complete service call handling system, customer and system diagnostic forms, example flat rate service repair invoices, residential service agreements, and staff performance based pay.
6. You, your Construction/Project Manager, Commercial Sales Rep, and Dispatcher/Receptionist staff will simply go to our Online Solution Center home page, click top right "Client Login" to access these training tracks:  
(3-Dark blue sessions for dispatchers/receptions) (8 – Dark green sessions for commercial sales reps)
  1. CP-STEP #1.0 ProjectPro Retrofit/Design Build Estimating and 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-Win" of Design-Build Opportunities
  5. CP-STEP #4.0 Efficient Retrofit/Design-Build Written Standard Procedures
  6. CP-STEP #5.0 Stocking service truck inventory for profits
  7. CS-STEP #6.0 Daily labor and Sales Opportunity Conversion Performance Benchmarking
  8. CP-STEP #7.0 Paying Retrofit/Design-Build laborers for Profits
  9. CP-STEP #7.1 Paying commercial Sales Reps for Profits
7. For our next meeting, client completes and prints out the following technician handouts:
  1. Download "ProjectPro" design-build/project estimating and pricing program, project proposal documents, "Install-Right Project Assessment Forms", the sales rep project opportunity assessment, estimating and pricing procedures. See session CS-1.0.
  2. Download and edit to your company the design-build/project prospecting strategies, and package of Installed-Right Solution Proposal Templates. See session CP-2.0.
  3. Order commercial B2B owner occupied call list from our preferred list broker. See session CP-2.0.
  4. Download and edit "Design-Build/Project 1st Call PowerPoint Sales Presentation". See session CP-3.0.
  5. Download and edit "Project Backlog Sales Report". See session CP-3.0.
  6. Download and review "Qualifying the Real, Worth and Win of Deal Opportunities". See session CS-3.1.
  7. Download and edit "Design Build-Retrofit Project Standard Delivery Procedures". See session 4.0.
  8. Print out and read for our next meeting the "Installers Performance Based Pay Plan" – See CP-7.0
  9. Print out and read for our next meeting the "Commercial Sales Reps Performance Based Pay Plan" – See CP-7.1

## During week #2:

8. For this next meeting, Business Fitness Coach will demo with management and get approval on which of our Design-Build/Project Department Company Standards to have us help you implement.
9. We confirm which processes are to be implemented.



# Design/Build Project Department Business Systems TRANSFORMATION PLAN

10. Upon completion of this session, Business Fitness Coach will send you the next weeks Growth Strategy Session Workout to be conducted with Dispatchers/Technicians meeting invite.

## During week #3:

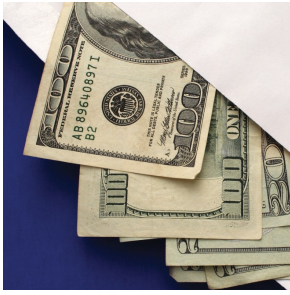
11. For this next meeting, Business Fitness Coach will demo with the Dispatchers/Technicians the Professional Design-Build/Project Call Handling Processes and forms, and project estimating and pricing methods, performance based pay, as well as, post call debriefing to identify installer labor productivity and commercial sales rep opportunity conversion rates versus expectations.
12. For this next meeting, Business Fitness Coach will demo with the Commercial Project Sales Rep your approved Professional Sales Call Handling Processes and forms and project pricing methods, performance based pay, as well as, post call debriefing to identify sales opportunity conversion rates versus expectations.
13. We clarify any questions and confirm Dispatchers/Technicians understanding of your Company Service Standards to be implemented.
14. We clarify any questions and confirm Commercial Service Sales Rep understanding of your Company Design-Build/Project Standards to be implemented.
15. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.
  - Typically, if you have enrolled in all 6 Departments, you also have our Human Resource Management Business Systems and therefore Business Fitness Coach schedules a meeting to implement our Performance Based Job Descriptions for your Sales Manager, Installers and Commercial Sales Reps to tie them to your newly implemented Design-Build/Project Department Company Standards.

## During week #4:

16. For this next meeting, Business Fitness Coach will discuss how best to set up your service truck stock and service agreement inventory, control processes, and forms. See session CP-5.0.
17. Business Fitness Coach will discuss the implementation of demand service written work delivery standards. See session CP-4.0.
18. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.

## Performance Review Meetings:

19. We recommend that you schedule periodic Design-Build/Project Department reviews with your Business Fitness Coach to enable operational adjustments to help you to continue to meet your above Client Business Benefit Objectives.



# Financial Management Department Business Systems TRANSFORMATION PLAN

## Improve your Cash Flow Management TODAY!

Within 4 weeks of client start date Business Fitness Coach helps establish the following business systems:

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

Client Business Benefit Objectives: (as reported by our enrolled clients)

- **Obtain a visual business management road map to the future success of your business.**
- **Quickly establish daily growth, spending, and operating benchmarks to help you proactively improve your businesses performance.**
- **Learn how to read a financial statement and how to break down your revenue and expenses by product/service to help you establish company pricing rates and policies.**
- **Be able to systematically improve revenue and profitability by driving business performance benchmarks in a positive direction.**
- **Learn the importance of protecting your business's cash payments and job related risks and liabilities and how to implement appropriate transaction document terms and conditions policies and procedures for all work categories.**
- **Learn how to implement proper inventory control policies and procedures for all work categories.**
- **Learn how to implement proper collections and accounts receivable policies and procedures for all work categories.**
- **Benefit objective is to improve profitability and competitiveness by pricing your work correctly, deliver consistent quality on all residential demand service work per our written, best-practice demand service standard operating procedures.**

During week #1:

1. **We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.**
2. **Upon completion of session, Business Fitness Coach registers you and your staff to access online business process and implementation training sessions.**
3. **Upon completion of session, Business Fitness Coach will send you the next week's Growth Strategy Session Workout meeting invite.**



# Financial Management Department Business Systems TRANSFORMATION PLAN

4. Upon completion of session, Business Fitness Coach will send an email for which online sessions to take on our Client Solution Center in order to obtain one or more of the above Financial Management Tools.
5. You, your General Manager, Accounting Manager, Bookkeeper and or Operations Manager staff will simply go to our Online Solution Center home page, click top right “Client Login” to access these training tracks:
  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 & 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
6. For our next meeting, client completes and prints out the following technician handouts:
  1. Download, review and compare the Residential and or Commercial HVAC Business Key Performance Indicators to your businesses operations. See session FM-1.0
  2. Download, review and edit to your business the Pricing Policy and Procedures. See session FM-1.0
  3. Download, review and edit to your business the Pricing Policy and Procedures. See session FM-1.0
  4. Download and review “Financial Management and Control Processes”. See session FM-2.0.
  5. Download proposal templates for Commercial Service Agreement, Design Build/Project and Lease Proposal document templates. See session 3.0.
  6. Download, review and edit to your business the Just-in-Time Inventory Control Process. See session FM-4.0.
  7. Download, review and edit to your business the “Accounts Receivable/Collections Standard Procedures. See session FM-5.0.
  8. Download, review and edit to your business the “BudgetPro Revenue, Expense and Labor Forecasting Program”. See session FM-6.0.

## During week #2:

7. For this next meeting, Business Fitness Coach will demo with management and get their approval on which of our Financial Management Department Company Standards to have us help you implement.
8. We confirm which processes are to be implemented.
9. Upon completion of this session, Business Fitness Coach will send you the next week’s Growth Strategy Session Workout to be conducted with Financial Manager, Operations Manager, or Bookkeeper meeting invite.
10. For this next meeting, Business Fitness Coach will demo with the Financial Manager, Operations Manager, or Bookkeeper your approved Financial Management Processes and forms.
11. We clarify any questions and confirm with your financial management staff’s understanding of your Company Financial Management Standards to be implemented.



# Financial Management Department Business Systems TRANSFORMATION PLAN

- 12. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.**
  - **If you have enrolled in all 6 Departments, you also have our Human Resource Management Business Systems and therefore Business Fitness Coach schedules a meeting to implement our Performance Based Job Descriptions for your Financial Manager, Operations Manager, or Bookkeeper to tie them to your newly implemented Financial Management Department Company Standards.**

#### During week #4:

- 13. For this next meeting, Business Fitness Coach will discuss how best to set up your financial management control processes, and forms. See session RS-5.0.**
- 14. Business Fitness Coach will discuss the implementation of demand service and service agreement written work delivery standards. See session RS-4.5.**
- 15. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.**

#### Performance Review Meetings:

- 16. We recommend that you schedule periodic Service Department reviews with your Business Fitness Coach to enable operational adjustments to help you to continue to meet your above Client Business Benefit Objectives.**



# Human Resource Management Department Business Systems TRANSFORMATION PLAN

## Increase your Staff's Motivation and Productivity TODAY!

Within 3 weeks of client start date Business Fitness Coach helps to establish the following business systems:

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

Client Business Benefit Objectives: (as reported by our enrolled clients)

- Implement performance-based job descriptions tied to your business systems and that double as tools for objective individual performance evaluation and corrective action planning.
- Implement an employee handbook that clearly explains your workplace policies.
- Learn how to create job analysis, job descriptions, implement effective recruiting strategies, screening the applicant resume, conducting an effective interview, screening interview and employment application questions, develop competency based interview questions, conduct post interview activities, personality assessment, making the job offer, evaluating training requirements, where to best provide and sources of training materials, core and skill specific competencies evaluation, recommended activities for self- development.

During week #1:

1. We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.
2. Upon completion of session, Business Fitness Coach registers you and your staff to access online business process and implementation training sessions.
3. Upon completion of session, Business Fitness Coach will send you the next week's Growth Strategy Session Workout meeting invite.
4. Upon completion of session, Business Fitness Coach will send an email for which online sessions to take on our Client Solution Center to obtain one or more of the above Human Resource Management Tools.
5. You or your General Manager, Human Resource Manager, and or Operations Manager staff will simply go to our Online Solution Center home page, click top right "Client Login" to access these training tracks:
  1. HR-STEP #1.0 Implementing Job Descriptions and Performance Evaluations
  2. HR-STEP #2.0 Employee Handbook Set-up
  3. HR-STEP #3.0 Recruiting, hiring, staffing, and deployment



# Human Resource Management Department Business Systems TRANSFORMATION PLAN

6. For our next meeting, client completes and prints out the following technician handouts:
  1. Download, review and edit to your business the Job descriptions. See session HR-1.0
  2. Download, review and edit to your business the Never Hire a Bad Salesperson Again article. See session HR-1.0
  3. Download, review and edit to your business the Staff Confidentiality Agreement. See session HR-1.0
  4. Download, review and edit to your business the Employee Handbook template. See session HR-2.0
  5. Download, review and edit to your business the Employee Job Evaluation. See session HR-3.0
  6. Download, review and edit to your business the Job Analysis. See session HR-3.0

## During week #2:

7. For this next meeting, Business Fitness Coach will demo with management and get their approval on which of our Human Resource Management Department Company Standards to have us help you implement.
8. We confirm which processes are to be implemented.
9. Upon completion of this session, Business Fitness Coach will send you the next weeks Growth Strategy Session Workout to be conducted with General Manager, Human Resource Manager, and or Operations Manager meeting invite.

## During week #3:

10. For this next meeting, Business Fitness Coach will demo with the General Manager, Human Resource Manager, and or Operations Manager your approved Human Resource Management Processes and forms.
11. We clarify any questions and confirm with your General Manager, Human Resource Manager, and or Operations Manager understanding of your Company Human Resource Management Standards to be implemented.
12. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.

## Performance Review Meetings:

13. We recommend that you schedule periodic Human Resource Management Department reviews with your Business Fitness Coach to enable operational adjustments to help you to continue to meet your above Client Business Benefit Objectives.