

	When used with Microsoft Office and the obtained customer's email address or cell phone number, this form enables the contractor to continue post-call harvest opportunities that remain to need attention. Access to print vendor included in Complete Appendix B Documentation Set.	
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2. 1-hour - #2 How to Stop Missing Your Fair Share of Replacement Opportunities via Onsite Survey Part #3:

- a. Review the onsite system replacement opportunity assessment form.
- b. Review the Installed-Right Solution Survey form.
- c. Review the system condition survey form.
- d. Learn how to use the duct & flue tables to verify ductwork capacities.
- e. Review the inside equipment survey form.
- f. Review the outside equipment survey form.
- g. **Subscription provided or purchase these documents:**
 - i. General Manager Job Training Tracks
 - ii. Operations Manager Job Training Tracks
 - iii. Service Manager Job Training Tracks
 - iv. Sales Manager Job Training Tracks
 - v. Comfort Advisors
 - vi. Selling Technicians

4 How to Stop Selling and Start Consulting & Telling

1. 1-hour - #4 How to Harvest More Business with Proactive Selling Strategies & Tactics Repair Trust Selling Approach Part #1:

- a. Review the 4-Steps of the consultative trust selling approach.
- b. Review why you need to standardize the service call handling process.
- c. Review why business growth & sustainability depends on selling service agreements.
- d. Review proactive repair trust-selling standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1007	Proactive Repair Call Handling Tasking Procedures Service managers and repair technicians use this standard procedure document to perform the step-by-step functions of a professional service call handling procedure and forms from a lead to sold repair customer checkout. This document is provided in original Microsoft Word format to be printed on your local printer.	\$99.95
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2. 1-hour - #4 How to Harvest More Business with Proactive Selling Strategies & Tactics Service Agreements Trust Selling Part #2:

- e. Understanding the Service Agreement Business.
- f. Review of the many customer benefits of a service agreement.
- g. Review the many company operating and business value benefits of service agreements.
- h. Review customer service agreement expectations.
- i. Review proactive service agreement trust-selling standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1008	<i>Proactive Service Agreement Sales Call Handling Tasking Procedures</i> Service managers, selling technicians and technicians use this standard procedure document to perform the step-by-step procedures of a professional service agreement call handling from a lead to sold agreement. This document is provided in original Microsoft Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95
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3. 1-hour - #4 How to Harvest More Business with Proactive Selling Strategies & Tactics Replacement Trust Selling Part #3:

- a. Review the system replacement business.
- b. Review of proactive trust-selling system replacement standards.
- c. **Subscription provided or purchase these documents:**

Product ID 1009	<i>Proactive Replacement Trust-Selling Standards Procedures</i> The selling technician and comfort advisors use this selling standard procedure to perform the step-by-step functions of professional project/design-build sales and operations from a lead to booking a sold replacement job. This document is provided in original Microsoft Word, Excel, PowerPoint, and Acrobat PDF format to be printed on your local printer.	\$99.95
Product ID 1010	<i>Replacement Sales Presentation (This is included in our Home Comfort Flat Rate Price Guide</i> This promotional tool is used by selling technicians and comfort advisors on a request for bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different?, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-installation, and (5) Investment Option Price Sheet to provide an upfront itemize and logical installation sequence and price to the customer. This promotional contract is provided in original Microsoft PowerPoint format to be printed on your local printer.	\$99.95

Product ID 1011	HVAC System Replacement Proposal Agreement Selling technicians and comfort advisors use this promotional and system replacement transaction contract. This document is multi-form; this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	Order from Print Vendor Under HVACPro Option #3 that Includes all Documents
1012	Ductless Mini-Split-System Replacement Proposal Agreement Selling technicians and comfort advisors use this promotional and system replacement transaction contract. This document is multi-form; this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	Order from Print Vendor Under HVACPro Option #3 that Includes all Documents
Product ID 1013	Boiler System Replacement Proposal Agreement Selling technicians and comfort advisors use this promotional and system replacement transaction contract. This document is multi-form; this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	Order from Print Vendor Under HVACPro Option #3 that Includes all Documents
1014	Pro-Tech Service Agreement Access to print vendor included in Complete Appendix B Documentation Set. Technicians use this promotional and maintenance transaction contract. This document is multi-form, and this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	Order from Print Vendor Under HVACPro Option #3 that Includes all Documents
1032	Which Contractor Best Meets Your Needs Questionnaire in Microsoft Excel Typically, when a customer does not sign, obtain the Which Contractor Best Meets Your Needs? Introduce this 20-questionnaire to the customer as a courtesy to our clients. This questionnaire helps the customer not get damaged by using an unworthy contractor. Nine out of ten times, the customer will not even get past the first five questions. For example, question 4 asks, "Do you perform drug testing to screen employees for hire?". Simply explain to the customer the following. Suppose a contractor comes on your property with an employee under the influence of drugs and gets hurt. In that case, they can sue you personally for allowing them to work on your property stoned. Ouch. Why is this an important question to ask? As proof, when contractors recruit technicians and installers applicants for hire and tell applicants that drug testing is required, only 6 out of 10 applicants return.	\$99.95

#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour - #5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards #1:

- a. How to get input and buy-in from all work delivery stakeholders.
- b. Review the business functions that must occur to be in business.
- c. Review why we need written work delivery standards.
- d. Review from a lead to job close out best practice service repair work delivery standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1015	<i>Service Repair Work Delivery Standard Procedures</i> Includes step-by-step work delivery tasking standards from a lead to repair job closeout. Service managers and operations managers use them. This document is provided in original Microsoft Word format to be printed on your local printer.	\$159.95
1018	<i>Equipment Start-up & Maintenance Tasking Procedures</i> These documents are used by service managers, installation managers, technicians, installers, and operations managers. HVAC service companies use this equipment start-up, text, and verification tasking procedures to adhere to the new ASHRAE standard 180P standards. These tasking procedures help you establish the minimum HVAC inspection and maintenance requirements that preserve a system's ability to achieve optimum operations. AccuTask includes 136 start-up and maintenance tasking forms for 99.9% of HVAC equipment and systems. These documents are provided in original Microsoft Word format to be printed on your local printer.	\$159.95

2. 1-hour - #5 How to Stop Inefficiencies with Proven Service Agreement Work Delivery Standards Part #2:

- a. Review from a lead to job close out, best practice written service agreement work delivery standards.
- b. **Subscription provided or purchase these documents:**

Product ID 1016	<i>Service Agreement Work Delivery Standard Procedures</i> Includes step-by-step work delivery tasking standards from a lead to service agreement job closeout. Service managers and operations managers use them. This document is provided in original Microsoft Word format to be printed on your local printer.	\$159.95
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3. 1-hour - #5 How to Stop Inefficiencies with Proven Replacement Work Delivery Standards Part #3:

- a. Review from a lead to job close out, best practice written system replacement work delivery standards.
- b. Creating a Project/Design-Build Statement of Qualifications.
- c. Example: Cover Letter and Statement of Qualifications.
- a. **Subscription provided or purchase these documents:**

Product ID 1017	System Replacement Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to Project/Design-Build agreement job closeout. Service managers and operations managers use them. This document is provided in original Microsoft Word format to be printed on your local printer.	\$159.95
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#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Review how your invoice or proposal agreement is a business contract.
- b. Review service repair payment & liability protection terms & conditions.
- c. Service agreement payment & liability protection terms & conditions.
- d. System replacement payment & liability protection terms & conditions.
- e. **Subscription provided or purchase these documents:**

Product ID 1022	Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set <ul style="list-style-type: none"> • A strong set of terms and conditions is critical. It circumvents any confusion about what you are selling and the transaction terms by which you make the offer. Your payment and liability terms and conditions agreement are both a social and a legal contract. Your terms and conditions establish how you do business in a socially acceptable manner. Still, it is also a legally binding contract between you and your clients. 	\$99.95
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#7 How to Retain the Best People with Proven Employee Retention Strategies

1. 1-hour - #7 How to Retain the Best People with Proven Employee Retention Strategies Part #1:

- a. Review how to implement work delivery standards.
- b. Review how to implement performance-based job descriptions.
- c. Review how to implement labor billable efficiency & productivity monitoring process.
- d. Review how to implement a company culture of success.
- e. Review how performance incentives help achieve business objectives by adhering to a high standard code of conduct.
- f. Review a best practice performance incentive plan for office staff, technicians, selling technicians, and Installers.
- g. Review a best practice performance incentive plan for comfort advisors.
- h. **Subscription provided or purchase these documents:**

Product ID	Complete Set Performance-Based Job Descriptions These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These	
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<p>1023</p>	<p>documents are provided in Microsoft Word format to be printed on your local printer. Set includes:</p> <ul style="list-style-type: none"> ● Dispatcher Job Description ● Comfort Advisor Job Description ● Service & Maintenance Technician Job Description ● HVAC Installer Job Description ● General Manager Job Description ● Operations Manager job description ● Sales Manager Job Description ● Service Manager Job Description ● Installation Manager Job Description ● Human Resource Manager Job Description ● Comptroller Job Description ● Project Manager Job Description ● Assistant Service Manager Job Description ● HVAC Technician Instructor-Trainer Job Description ● Lead Service & Maintenance Technician Job Description ● Receptionist/Customer Care Specialist Job Description ● Office Manager Job Description ● Accounts Payable Job Description ● Accounts Receivable Job Description ● Truck Driver/Warehouse Supervisor Job Description 	<p>\$99.95</p>
<p>Product ID 1024</p>	<p><i>Performance Incentive plan - Office, Technicians & Installer</i> Service managers and operations managers use this document. This document is provided in original Microsoft Word format to be printed on your local printer.</p>	<p>\$69.95</p>
<p>1025</p>	<p><i>Performance Incentive plan - Comfort Advisor</i> Service managers and operations managers use this document. This document is provided in original Microsoft Word format to be printed on your local printer for only \$69.95.</p>	<p>\$69.95</p>
<p>Product ID 1029</p>	<p><i>Employment Application</i> This job or employment application is an official form given to applicants asking a wide range of questions both about the individual and their skills related to the job. Forms are legally defensible and stand as a way for applicants to introduce themselves to employers. Employees can be justifiably terminated for providing false information on this document that may be found post-hire. his document is provided in original Microsoft Word format to be printed on your local printer.</p>	<p>\$69.95</p>