

A TO Z
BOOK
ON
COMMERCIAL
HVAC SERVICE
BUSINESS

Mastering a Thriving
Commercial **HVAC** Business

WENDELL BEDELL

A to Z Book on Commercial HVAC Service Business

This MASTERCLASS commercial HVAC service business growth program provides your employees with a clear path to career advancement with job training tracks.

General Manager to .all HVAC service business positions located on
Appendix E – Staff Job Training Class Descriptions & Schedules

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Introduction

What do commercial HVAC service business owners want? They want success, to have more leads, to make more money, and to free up more time for themselves and family. However, most of us have a problem. There is a villain called *too many distractions preventing them from getting what they want*. They need business help found in this textbook..

This textbook and our available online support efficiently help fix this

“I looked at all of the major consulting services, and felt that Wendell Bedell offered the best value. We're using his Goodman flat rate service, flat rate installation price books and his HVAC professional business processes and practices. My assign HVACPro implementation coach is very responsive and was adaptive to some of our unique business needs. We view their services as complete business system, pricing system and an affordable alternative to a franchise.”

Frank DiGirolamo
Progressive Air Solutions, NJ

“We have been using Wendell Bedell’s, President of Grow My HVAC for a couple years and can only say great job to Wendell and his team. Our growth has been consistent since we started on the program and our profits are up. I have found if you just follow the program and with practice you can become a very professional comfort advisor and harvest more opportunities that we may have overlooked in the past. I would highly recommend this program.”

Clint Green
Premier Heating & Air Conditioning, ID

This textbook gives you both an efficient strategic business plan and an HVAC job career learning curriculum for you to take to achieve success today! **Job training is now as simple as 1-2-3.**

Go to Appendix E – Staff Job Training Tracks Class Descriptions & Schedules

Step #1: Locate your job training track and start with your first identified learning section or online class and continue with each consecutive section or class, ending with the last to self-develop your manager, administrator, field job, or your next career advancement job skills.

Step #2: Integrate the proven HVAC job sequence roadmap, or establish your pricing systems, operating, work delivery processes, and even take advantage of our HVACPro right-at-your-desktop online staff training and process implementation support located in **Appendix D – Need Help Expediting Change.**

Step #3: Enjoy sustainable success. You will learn to TRANSFORM your HVAC business skills to outperform the competition. Imagine what your HVAC Business's performance would look like if you could learn to run your business more like the best in the business.

The Many Commercial HVAC Business & Career Advancement Benefits

OBTAIN A CLEAR PATH FOR BUSINESS OWNERS OR CAREER ADVANCEMENT

This textbook provides **you with a prioritized step-by-step strategic business development tasking plan** to implement best practice processes within your business. We present today's best practice sequence labor tasking process & forms required to complete each business management and work delivery function of the company. These business and work delivery functions are also packaged into standard industry job training tracks for each member of your business.

INCREASE YOUR CHANCES OF SUCCESS

Successful contractors know it is all about **managing people to process that enables success**. Processes that help you consistently capture your fair share of revenue and profit opportunities. We have customers that have gone from negative net profit before taxes to 30%+ within the first three months of implementing textbook best practice HVAC business and work delivery processes.

MARKET YOUR WORK BETTER

In this textbook **we provide you with** residential lead generation strategies for your repair, service agreement, replacement, and retrofit/design-build project services.

SELL YOUR WORK BETTER

We provide value-based selling processes for residential service agreements and projects that provide our clients with up to 60% or more close rates at higher gross profit margins versus price-only selling methods.

PRICE YOUR WORK BETTER

We provide best-practice repair service, replacement installation, retrofit, and design-build pricing methods.

ORGANIZE YOUR WORK BETTER

We provide a complete set of *proven business and work delivery processes* to train your staff. Operating and work delivery processes your staff can replicate every time. We also help you right-size to full staff utilization and manage your team to operating or work delivery standard procedures.

OBTAIN UNLIMITED ACCESS TO BUSINESS TRAINING

Our HVACPro Masterclass Club offers unlimited access to online LIVE staff job education and implementation training focused on the HVAC process.

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Welcome to the Fastest Means to Success



To work for yourself, be your boss, and run your own HVAC business - for many, these phrases describe the American dream. However, becoming a successful HVAC business owner is not an easy task. It requires skill, motivation, demanding work, and good luck. The HVAC business owner stands on the brink of a fantastic future with a thousand HVAC-related business questions that need answers.

This HVAC Business Operating Guide is researched based on proven practices for commercial HVAC service, retrofit, update, and replacement businesses. Each departmental chapter provides a set of proven business processes, methodologies, and governances for a successful commercial HVAC business, designed to FAST TRACK your business growth and development efforts. Discover how the HVAC processes included in its chapters are fueling contractor success. Even in these fast-changing times, hundreds of the top commercial HVAC service companies have been established throughout the US and Canada.

Commercial HVAC service, retrofit, update, and replacement businesses are Defined

A Commercial HVAC service and system replacement business fall into a unique HVAC business category. They fall in with those that directly market, sell, and deliver services to individual commercial, industrial, and institutional HVAC building markets versus construction companies or those that serve general contracting entities.

Direct marketing, selling, and delivering services entails any marketing, onsite opportunity assessment survey checklist, or lead generation process. These rely on direct communication or distribution to the individual facility operator decision-maker rather than through mass media, e.g., the internet, radio, and TV. These commercial contractors have moved away from print media. They now reach and follow up on opportunities directly with the buyer of the commercial services by phone, email, text, or direct mail.

What Most HVAC Contractor Owners Want

Use this Guide to help you create a step-by-step improvement action plan for your unique business needs and to help guide your business quickly toward the 3-key HVAC business success objectives:

1. Make the phone ring more by:

- a. Improving targeting to generate more qualified leads.
- b. Improving offering resonance, differentiation, and substantiation in your value propositions.
- c. Improving your sales skills to uncover complete needs set, establish relationships, communicate solutions, negotiate a plan of attack to win business, and close deals.

- d. Improving lead conversion rates through your brand, lead nurturing, and relationship building.
- e. Improving internal communication of all work delivery stakeholders to discuss offerings and pricing models.

2. Make more money by:

- a. Improving pricing to make a fair profit while recovering field non-chargeable time.
- b. Improving the perception of service/work delivery quality.
- c. Improving the internal perception of your work, team, and company.
- d. Improving relationships with your people, establishing suitable structures, and work delivery processes.
- e. Improving surveying, estimating, and proposal writing to minimize risk, liabilities, missed opportunities, and meeting customer work delivery and financial transaction expectations.
- f. Improving cash flow and maximizing resources with proper monthly budgeting and staffing loading.
- g. Improving operating performance by using daily financial and work tasking operating performance benchmarks and rules-based management to maximize company profitability and business value.
- h. Improving productivity using performance-based incentives and incentive programs.

3. Make more FREE time for themselves and their family by:

- a. Improving and implementing standard delivery procedures that begin with a lead and go right through work close-out for all your work categories.
- b. Improving staff motivation by implementing an employee handbook, performance-based job descriptions, and performance incentives.

Tools & Strategies to Increase Profitability in a More Challenging Market

This guide is the fastest and most logical step-by-step masterclass commercial HVAC service growth program ever. We know what commercial HVAC service contractors need to succeed in their businesses.

Every year, you need tools and strategies to increase lead conversion rates and decrease the time dedicated to serving customers in a more challenging market. This guide offers you a way to do both. The primary purpose of This textbook is to act as a change management action plan to drive future revenue and operating performance. These action plans to implement proven business and work delivery processes create a roadmap for you and your staff to reach your goals.

Our company can design special-purpose training sessions to solve the needs of our commercial HVAC contractor's profit improvement initiatives. Since each contracting company is unique in its

people, business mix, and goals, we are ready to help guide you through the benefits of the program. We help you expedite the implementation of the books proven processes within your business. Join us today and outperform the competition within days of enrollment. Take charge. Take your HVAC business to the next level. It is your future. Use this Guide to get started.

- 100% profitability & sustainability via pricing operating standards.
- 65%+ increase service revenues.
- 50%+ service agreement close rates.
- 99% callback reduction.
- 100% customer retention.
- 100% employee retention.
- And yes, by freeing up more personal time.

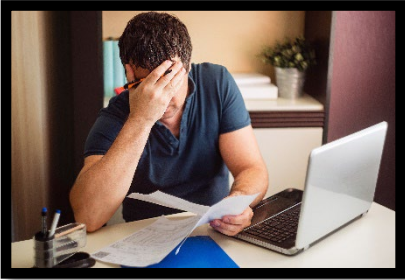
The contractors getting these results to understand the classic rules for making a first-rate service call, namely:

- Get there at the promised time.
- Diagnose the problem accurately.
- Decide whether best to repair or replace.
- Perform the work right the first time.
- Leave the work area better-looking than it was initially.

They understand extending training beyond training service technicians and installers; they also include support staff. Each employee in your service business should have:

- The knowledge to do the job right the first time.
- A desire to serve the customer in the best manner possible.
- A desire to work in an employee-friendly workplace that prioritizes making employees happy at work. We find that workforces with high job satisfaction can positively affect productivity, customer satisfaction, and overall profitability.

We, Commercial HVAC Contractors, Have a Poor Profitability Problem



Did you know that there are 196,000 HVAC Contractors throughout the U.S. and Canada? Studies show they ALL share a single common goal. They want to be successful-- for their families, employees, customers, and themselves.

If this sounds a lot like you and your company, doesn't it? Unfortunately, the US Census Bureau reported that the average HVAC contractor makes only 2.3% Net Profit Before Taxes. Now, which is powerfully close to making no money. Making no money is why 10% of all HVAC companies quickly experience serious cash flow problems that result in some suffering business failures. 2.3% net profit means 97.7% have POOR Profitability. However, they deserve 12%-20% due to the risk of touching a commercial business's HVAC equipment and working on their properties.

Most commercial HVAC service, retrofit, update, and replacement business owners and managers have little experience or training in the *BUSINESS* of HVAC service contracting, marketing, or selling. Most are technicians who know how to work in the industry. Many owners make a fatal assumption: if you understand the technical work, you understand a business that does that technical work. This assumption is so lethal because it is simply not true. It is the root cause of most HVAC poor profitability and business failures.

The ultimate difference between the success or failure of your contracting business is how hard you think about your business instead of how hard you work in it. We want you to think about improving your and your family's life by developing a company built on extraordinary business processes; about getting a life that is yours.

With this new thinking, let us explore these questions that contractors typically ask us when they begin thinking about improving their business and their personal life.

- How can I get my business to work without me?
- How can I get my people to work without my constant supervision?
- How can I standardize my business to be replicated and run smoothly every time?
- How can I own my business and still be free of it?
- How can I spend the time doing the work I love rather than the work I have to do?

This **Commercial HVAC Service Business Operating Guide** provides ANSWERS to improve your business's profitability and your or your manager's personal quality-of-life questions. First, we will need an understanding of the four common poor profitability business symptoms. Then second, we need an understanding of the eight associated poor business processes that cause these poor profitability symptoms. The Guide's Table of Contents will direct you to find your unique solutions

Common Poor Profitability Symptoms that Can Be Fixed

1. **Poor Cash Flow:** Cash flow is one of the essential aspects of operating an HVAC business. Cash flow shows the money flowing into a business from sales. Interest payments received any borrowings and the amount of money flowing back out of your business. Cash flow should not be confused with profit - they are different concepts.
 - a. Suppose the cash flowing into a business does not promptly meet the cash flowing out. Eventually, a company will be unable to meet its debts and could be forced out of business. Hence to the old saying, "Cash is King."
 - b. The poor cash flow poor profitability symptom is defined as more cash flowing out than in - and is the biggest reason many HVAC businesses fail. The unfair truth is this. The HVAC services you provide may be top quality, and your business could be sound in every other way.
 - c. Still, the business could disappear if you do not manage cash flows.
2. **Low or Cyclic Revenues:** They have low or cyclic revenues. Poor or no business-to-business lead generation program attributes to cyclic revenues and inadequate cash flows. Poor lead generation can result in catastrophic cash flow problems. Also known in our industry as a "feast or famine" sales cycle.
 - a. Not using an onsite service or sales **Opportunity Assessment Forms** is attributed to cyclic revenues and inadequate cash flows.
 - b. These result in contractors missing 65% or more in revenue opportunities.
3. **Poor Customer Retention:** They have poor customer retention, which is a death knell for any service-based HVAC business. All HVAC businesses rely on customer retention to keep their companies flourishing and growing. The key to success is not a one-time buyer but the repeat buyer. Repeat buyers keep returning and become the base of your business that you can rely on for future business.
 - a. That is why customer retention is so necessary - if none of your customers return, you will never grow.
 - b. The cost of poor customer retention is huge. When customers leave your business, they take their money to your competitor. You've not only lost revenue for your business, but you have also increased the profitability of your competition.
 - c. It is a "double whammy" that can irreparably damage your business. We designed this Guide to help you quickly identify and initiate fixes to specific aspects of your business operations that are lessening profitability or customer dissatisfaction.
4. **Poor Employee Recruiting/Retention:** They have poor employee recruiting and retention, preventing them from finding, getting, and keeping good people. Low morale is the leading cause of employee turnover and is a massive barrier to effectively retaining 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. Do you know what low employee morale could be costing your organization?

- a. Management understands that an employee feels treated disrespectfully or unfairly when a manager shows indifference toward the staff's working conditions.
- b. How an employee feels and how well respected they feel is also related to how motivated they are about their employment with your company. Focusing on this area impacts how an employee feels and where you can retain them.
- c. Compounding good people leaving the company is the failure to pay them like owners for their profitable contributions to the business.
- d. Another key reason for people terminating is the failure of management to train their staff on best practice work delivery standards.

Business & Work Delivery Processes Causing Poor Profitability

Let us review these poor profitability symptoms and their associated business process problems. These 14 common causes of poor profitability result in losing 85% of all HVAC start-ups within the first five years and another 10% each year after that. They are shown below in the order from most significant to most negligible impact on poor profitability and sustainability:

1. They use underpricing as a primary closing mechanism

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues.**
- b. They do not correctly recover technician and installer non-chargeable billable hours.
- c. They do not recover post-call repair or replace warranty labor and material support costs.
- d. They do not recover the overhead cost.

2. They have poor or no lead generation

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues.**
- b. They do not have a commercial HVAC service-friendly website.
- c. They do not use onsite opportunity assessment forms to identify all service opportunities on service and sales calls.
- d. They do not convert catastrophic repairs to replacements by helping clients with the repair or replace decision.
- e. They do not continue to harvest all available service opportunities post-call via seasonally timed direct email and text campaigns to target customers.

3. They lack service/product brand(s) differentiation

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 3. Poor Customer Retention.**
- b. They do not create a name, symbol, or design for service repairs, maintenance agreements, or replacements that are distinguishable as belonging to the company.

- c. They do not use branding services to help customers identify your product and distinguish them from competitor products and services.

4. They lack value-added selling processes

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 3. Poor Customer Retention.**
- b. They do not use Proactive selling vs. using low-priced reactionary selling.
- c. They do not interview customers about the system and customer needs for resolving their comfort, health, safety, property, or financial requirements.
- d. They do not use HVAC equipment's energy operating cost savings to show how much more customer is paying above the present service provider's fees.

5. They have an absence of defined operating & work delivery processes

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 3. Poor Customer Retention & 4. Poor Employee Recruiting/Retention.**
- b. They do not motivate staff to perform at higher levels using 100% customer satisfaction, 100% company profitability, and 100% employee-friendly work delivery processes.
- c. They do not use work delivery standard procedures to provide staff with the “How-to-do-Book” job training guides.
- d. They cannot reduce mobilization, human errors, missed tasking, and business risk.
- e. They cannot eliminate call-backs via quality control start-up, test & verification forms.

6. They do not use proper payment & business liability protection terms & conditions

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 3. Poor Customer Retention.**
- b. Its proposals do not use proper transaction terms and conditions to prevent severe cash flow disruptions and job cost overruns.
- c. They do not have proper proposals or invoices defining work scope, protecting payment, and eliminating job risk liabilities for all work categories.

7. They lack labor-management controls

- a. Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 3. Poor Customer Retention & 4. Poor Employee Recruiting/Retention.**
- b. They do not use step-by-step work delivery tasking standards to enable managing people to process.
- c. They do not use job descriptions with clear job expectations and establish behavior with customers, the company, and fellow employees.
- d. They do not use performance pay for management, office, or field staff to influence work behaviors to achieve conversion rates and the budgeted job hours.
- e. They do not track the billable efficiency of each field staff member.
- f. They do not track actual and compare industry conversion rates for system fixes, enhancements, accessories, replacements, and the individual service technician, selling technician, and commercial Sales Rep.

8. They lack year-round labor recruiting & retention strategies

- a. Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 4. Poor Employee Recruiting/Retention.**
- b. They do not continuously recruit to find the best people.
- c. They do not have a professional-looking website.
- d. They do not use social media like Facebook to advertise a position.
- e. They do not create recruiting handouts and flyers.
- f. They do not make sure job descriptions match the position.
- g. They do not have competitive benefits packages for office, sales, or field staff.
- h. They do not use employee networks to recruit.
- i. They do not educate techs and installers on typical repair and replacement call handling results.
- j. They do not train technicians on soft-skill communication, provide scheduled manufacturers product training, NATE certification, or conduct in-house technical cross-training.

9. They do not organize the business for efficient growth

- a. Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 4. Poor Employee Recruiting/Retention.**
- b. They do not logically organize and group the office administration delivery function.
- c. They do not logically organize and group the sale delivery function.
- d. They do not logically organize and group the service delivery function.
- e. They do not logically organize and group the system replacement or design-build delivery function.

- f. They do not logically organize and group the construction delivery function.

10. They do not have proper customer care or within the dispatch function

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 4. Poor Employee Recruiting/Retention.**
- b. They do not correctly organize customer care inbound call Club functions.
- c. They do not correctly organize customer data for easy access by the receptionist and the dispatch function to support field operations properly.

11. They do not forecast their staffing and expense budgets

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues.**
- b. They do not create a monthly spending plan for labor and equipment materials.
- c. They do not identify break-even monthly revenue to cover operating expenses - or, as they say, “just to keep the lights on.”

12. They are unable to recruit & retain top performers

- a. **Negatively Impacts Symptoms 4. Poor Employee Recruiting/Retention.**
- b. They do not continuously recruit.
- c. They do not use upfront pricing with the customer.
- d. They do not price the ability to hire and retain the best people.
- e. They do not use performance incentive pay for personal contributions to company profitability.
- f. They do not use customer or employee-friendly work delivery tasking standards.
- g. They do not use job descriptions to communicate employee job and work behavior expectations.

13. They lack financial management skills & business mix tracking

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 3. Poor Customer Retention & 4. Poor Employee Recruiting/Retention.**
- b. They do not use key performance indicators to drive conversion rates per call.
- c. They do not use key performance indicators for driving business revenues, cost-of-goods-sold, overhead, and net profit before taxes in positive profit directions.
- d. It cannot connect the office with the field to schedule more jobs and get paid faster.
- e. They do not harvest post-call available opportunities via obtained customer’s email or text.
- f. They do not allow technicians or installers to capture customers’ signatures and authorization to work directly on their smartphones or tablet.

- g. They do not auto-record individual staff payroll clock in/clock out for time-based payroll reports.
- h. They do not use proper customer call handling to inform the customer when the service technician or installation crew is on their way via text or email.
- i. They do not integrate estimates with emails to send customers estimates, job confirmations, or invoices from the office or field handheld and smartphones.
- j. They do not get a business performance snapshot of total calls, inbound, outbounds, and no-answer calls.
- k. They do not see what channel leads came in from, why the customer called, and whether it converted into a job or an estimate.
- l. They do not easily access customers' contact information or establish their personal communication preferences.
- m. They cannot obtain work updates, make deposits, send invoices, take payments automatically, and seamlessly update QuickBooks for you.
- n. They do not have immediate access to all customer contacts and equipment information to enable the job to be fixed or installed the first time.

14. They lack leadership training & education plans

- a. **Negatively Impacts Symptoms 1. Poor Cash Flows & 2. Low or Cyclic Revenues & 3. Poor Customer Retention & 4. Poor Employee Recruiting/Retention.**
- b. Managers or supervisors do not use proven staff motivation techniques.
- c. Managers or supervisors do not understand what successful leadership behavior characteristics they should strive to improve.
- d. Managers or supervisors do not have a continuous leadership skill self-development plan.

This is a How-to-do Book to Profitability Grow Your Business or Advance Your Career

You can use this Guide as your **Strategic Action Tasking Plan**. Other than giving up to 9% to 14% right off the top of your company's revenues to a franchise, just to get this complete business operating guidance.



You will find that This textbook delivers the greatest and most logical step-by-step masterclass commercial HVAC service growth program ever.

The more profitable commercial HVAC service, retrofit, & replacement business are growing 27% more annually even during these tough economic times. Many of our clients have a banner year because they build up their service agreement base and provide top-notch professional HVAC services. There is no secret. It is all about managing people to processes.

We created this Guide as a guide as a low-cost means to help commercial HVAC service, retrofit, & replacement businesses to quickly implement efficient and effective professional operations used by the more profitable contractors.

What are our more profitable commercial HVAC service, retrofit, update, and replacement businesses doing differently from the rest? Our clients use this operating Guide's proven commercial processes, methodologies, governances, and associated delivery forms within their commercial HVAC service business.

Within each chapter, we reference commercial business standards and forms. To order the presented business standards or documents, go to Appendix A - Need Help? Order These Business Operating Documents where you can get details by product ID number.

This textbook Helps Owners & Their Staff Strive to Obtain Success

Your employees are the ones delivering your products and services. It is your manager's job to make sure they do it efficiently. There are some universally "wrong" ways to manage an HVAC business. Ignoring them has caused many thousands of contractors to go out of business within the first 5-years of opening their doors. And another 10% goes out of business every year after that.

It would be best if you avoid business mistakes by complying with these essential business operating ground rules (maxims) of effective business operating management:

- You only need employees in your business to process your book of business.

- You need a company operating and work delivery processes for employees to follow and management to manage its people to process.
- You need job descriptions with all employees to get them under contract to provide a set of labor tasking services for a fee (wages).
- You only need managers in your business to manage your people to process.
- You should staff up to 100% labor utilization to prevent higher operating costs than the competition. Underutilized labor capacity recovery in your pricing can cost you jobs.
- You should have proper payment and transaction terms and conditions to protect the business from non-payment and regular business operating liabilities.

Follow the 5 Basic Service Business Operating Rules of Success

Everyone wants success, which many people lust after, but few individuals logically pursue in their businesses, jobs, or careers. Why? Because we are so busy working in the business not on the business. This is because most of us hope for a shortcut that will lead us directly to success.

This is one of two HVAC service business textbooks that have been developed just for you, a person who is thinking about or starting a small HVAC service. It is targeted to HVAC owners and their staff people who want to learn more about successful business growth strategies or to gain job-specific skills. Wendell and his training have helped people just like you to be successful. All of us know how important it is to have clear and concise information to make smart decisions with your time. Our goal is to share our vast US and Canadian HVAC contractor network of business development experiences.

This textbook has compiled what is working to drive success as found in the top 2.8% HVAC service business throughout the US and Canada.

This textbook guide owner, their managers, and their staff to strive to use right-off-the-shelf textbook information to quickly obtain and operationalize these successful characteristics of success:

- 1 They possess a service delivery strategy developed for each service or job offering.
- 2 They know that employee relations mirror customer relations and understand that employees with positive attitudes about their company will transmit this to commercial customers.
- 3 They automate high-touch service systems *everywhere possible* with a 100% client satisfaction focus and a 100% employee-friendly focused built-in delivery process.
- 4 They measure their business and service delivery performance to verify that their pricing, labor productivity, and work delivery processes are profitable. They also make the results known to all work delivery stakeholders.
- 5 They do not invoice any customer willing to “pay now” upon completion.

Use the Right Off the Shelf Best Practices

This operations and procedure Guide contains the best-of-the-best-practice information about operating a commercial HVAC service, retrofit, & replacement business. You can use the processes right off the shelf or customize them to your unique business requirements.

This Guide is created specifically for your administration, HVAC service, retrofit, & replacement business department's management and staff. It provides you and them with a resource to refer to when in doubt about how to go about a task, specific business policy, or work delivery process or forms.

It is a terrific manager reference guide for choosing the right direction for your commercial HVAC service, retrofit, & replacement business. It is also a great starting point for someone who knows nothing about successfully running a profitable and sustainable commercial HVAC service business.

Commercial HVAC managers across the board list the top 3 most important profitably growing business issues:

1. Generating sales and revenue.
2. Onboarding new hires on remote work technologies.
3. Training staff on work delivery processes.

You will find proven growth answers to these profitably growing business issues.

This 14 step-by-step strategic business growth & development tasking plan and the available live training through the HVACPro Masterclass Business Growth Club are provided in the same logical 3-Phase Business Development Plan.

Today, we live in a time where there is simply no “not knowing.” Suppose you or someone processing your book of business lacks the answer to their question. In that case, the information is seconds away with this Guide and our live and recorded HVACPro Masterclass Business Growth Club classes.

Confidence is critical in this business environment. Without having confidence in their learning, people are hesitant to adopt best practices and move their businesses forward.

We are a single source of commercial HVAC service business truth to ensure learners trust the knowledge and information delivered. We have logically organized learning content that connects you and your staff to relevant information in a familiar, easy-to-use format.

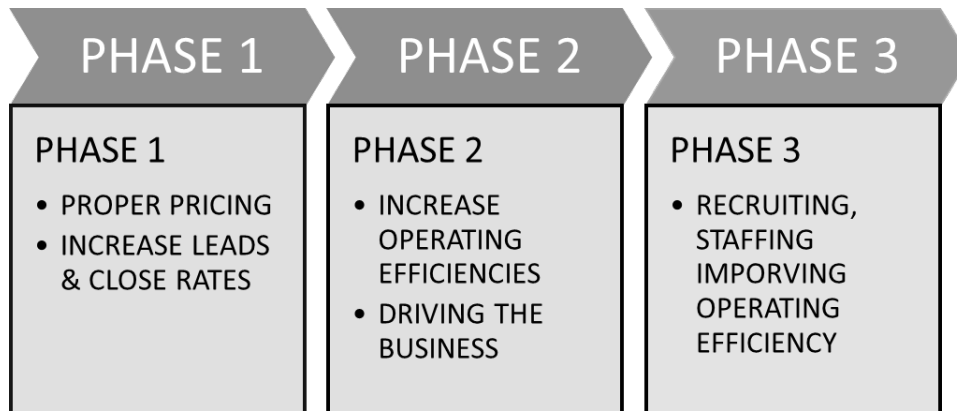
Where to Start Your Business Growth or Job Development?

Where should you start your business growth and development? We recommend starting with implementing the chapter described in Appendix E. Why General-Service Manager Job Training #1 starts by verifying that the business is pricing its work to be profitably sustainable. The first thing to

do is confirm that you can cover operating overhead expenses to keep the door open and to be able to make payroll. Not to mention that not paying staff is illegal.

Then work through the 14 step-by-step business growth and develop chapters in the logical order that business development consultants use. Start with #1 and then continue consecutively to impact your profitability and sustainability significantly.

This business development program is grouped into (3) three logical business growth phases, with each class delivered in sequence.



Phase #1: Proper Pricing, Increase Leads & Conversion Rates (12- Classes)

1. How to Price Your HVAC Services to Make a Fair Profit.
2. How to Drive Consistent Growth with Proven Lead Generation Strategies & Tactics.
3. How to Win More Business by Differentiating Your Services.
4. How to Harvest More Business with Proactive Service & Selling Strategies & Tactics.

Phase #2: Increase Operating Efficiencies & Driving the Business (12- Classes)

5. How to Drive Operating Efficiencies with Work Delivery Tasking Standards.
6. How to Protect the Business with Proper Terms & Conditions.
7. How to Retain the Best People with Proven Employee Retention Strategies.
8. How to Drive Profitability Using Key Performance Indicators.
9. How to Efficiently Organize the Business for Growth.
10. How to Implement Proper Customer Care Call Handling Procedures.
11. How to Forecast Your Monthly Spend Plan.

Phase #3: Recruiting, Staffing & Improving Operating Efficiency (4- Classes)

12. How to Recruit and Retain Top Performers.
13. How to Select and Implement Field Management Software.
14. How to Self-Develop Your Leadership and People Skills.

Commercial HVAC Owner & Staff Job Training Included In This Textbook

This Guide provides you and your staff job training on best practice work delivery processes. An essential quality of learning is that it must demonstrate its relevance to the learner. Learners want to know how the class content relates to them and their job roles and responsibilities to help them do their job better.

We recommend that people performing these job duties below read their relevant job's work delivery standards from a lead to job close-out:

Owners /Managers

- Owners/General Managers
- Sales Managers
- Marketing Managers
- Service Managers
- Operation Managers
- Installation Managers
- Office Managers
- Project Managers
- Inventory Control Managers
- Accounting Managers
- Warehouse Managers
- Human Resources Managers
- Fleet Managers
- Those Buying an HVAC Business

Office Support Staff

- Dispatchers
- Receptionists
- Bookkeepers
- Payroll Administrators
- Sales Support
- Accounts Payable/Receivables

Field Staff

- Service Agreement Sales Reps
- Project/Estimator Sales Reps
- Project Managers
- Project Estimators
- Technicians
- Crew Chiefs
- Installers

Appendix D – Need Help Expediting Change



Successful contractors know it is all about managing people to process that enables success. Processes that help you consistently capture your fair share of revenue and profit opportunities. We have customers that have gone from negative net profit before taxes to 30%+ within the first three months of implementing textbook best practice HVAC business and work delivery processes.

We encourage you to tap into our experience and expertise as HVAC business managers for many successful residential HVAC companies. We can help you expedite the implementation of this masterclass set of best practices, so you can:

- Turn underperforming business offerings into super-successful fast.
- Attract and retain top people by developing your own internal business coaching program.
- Coach your service team to become Proactive through best practices.
- Empower your people to solve their problems and become fully accountable for their success.
- Handle difficult people and determine when to let them go without collateral damage.

Our Help can mean the Fastest Means to Success

We know what dealers need in their businesses to be successful. Every year, you need tools and strategies to increase lead conversion rates and decrease the time dedicated to serving customers in a more challenging market every year. We can offer you a way to do both.

The primary purpose of a change management action plan is to drive future revenue and operating performance. These action plans create a roadmap for you and your staff to reach your goals. Our company can design special-purpose training workout sessions to solve the needs of our residential HVAC contractor's profit improvement initiatives.

Since each contracting company is unique in its people, business mix, and goals, we stand ready to help guide you through all of the program benefits and help expedite implementation of our proven processes.

It is your future. Take charge. Take your HVAC business to the next level. To get started, enroll in to the HVACPro Masterclass Business Growth Club. Join us today and outperform the competition within days of enrollment.

How to Enroll in HVACPro Masterclass Business Growth Club Classes

This program contains the best-of-the-best-practice information about operating a residential HVAC service, retrofit, & replacement business. You can use the processes right off the shelf or customize them to your unique business requirements.

The A-to-Z book is a terrific manager reference guide for choosing the right direction for your residential HVAC service, retrofit, & replacement business. This program provides live implementation support for its operational and work delivery processes.

It is also a great starting point for someone who knows nothing about successfully running a profitable and sustainable residential HVAC business.

The client called us at **(800) 240-2823** or **emailed us at News@WendellBedell.com** to request that we send the “HVACPro Masterclass Service Business Growth Club” order form.

- **Good** - Purchase Textbook – The client selects to purchase an A to Z Book on Commercial HVAC Service Business eBook for \$99.95. Your purchase entitles you to register for a class on www.WendellBedell.com and pay \$49.95 to attend.
- **Better** - Purchase Textbook and All 30 Classes – The client selects purchase A to Z Textbook on Commercial HVAC Service Business eBook and can register for any of the 30 classes on www.WendellBedell.com and pays \$99.95/month for 12 months.
- **Best** - Purchase Residential and Commercial Textbooks, All Documents, and All 60+ Classes – The client selects purchase both A to Z Textbook on Residential and Commercial HVAC Service Business eBooks, and provided if you checked to **receive the 3, repair, system replacement and ductless mini-split-flat rate price guide set**, and all available documents, and can register for any of the 60 residential and commercial job training track classes on www.WendellBedell.com and pays \$149.95/month for 12 months.
- The client selects which of the live and recorded 1-hour classes to take and selects a class time the first and third week of each month on Tuesday-Wednesday-Thursday except on Holidays or instructor during vacation periods. See Appendix E – Staff Job Training Class Descriptions & Schedules.
 - Attendees find immediate one-on-one management help implementing proven work delivery standard processes contained in the textbook.
 - These client training classes have helped thousands of residential HVAC service businesses grow exponentially.

Appendix E – Staff Job Training Tracks Class Descriptions & Schedules

Training and development help HVAC SERVICE companies gain and retain top talent, increase job satisfaction and morale, improve productivity, and earn more profit. Additionally, HVAC businesses that have actively interested and committed employees see ABOUT a 41 percent lower absenteeism rates, and 17 percent higher productivity. This webinar provides immediate solutions to ACHIEVE THESE ENDS.

In these courses, we present WHAT commercial HVAC service contractors should provide their staff for job training on today's best practice work delivery processes and forms. As a result of actual client residential and commercial HVAC service contractor growth, we see up to a 65%+ increase in revenues, profits, and contractor sustainability..

"This program has helped me keep things simple and make them, so I do not have to learn the hard way. I finally am now making a fair profit. This book provides the tools necessary to implement a winning strategy."

Chris Fisher
Fisher Mechanical

"This program has certainly helped bring my business to the next level. I highly recommend this book for any commercial HVAC business looking to expand their bottom line and organize their company."

Jonathan Burbank
Custom Climate

Successful contractors know it is all about managing people to processes that enable success. Processes that help capture your fair share of revenue and profit opportunities. We provide franchise-like business and work delivery processes that can train your staff on processes that can be replicated every time.

General Manager/Operation Manager Job Training Track & Monthly Schedule

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-one:

- a. Light-Commercial Upfront Repair Pricing Method.
- b. Time & Material Repair Pricing Method.
- c. **Subscription provided or purchase these documents:**

Product ID 1001	<p><i>Done-Right Flat-Rate Price Guide</i> You can order the Done-Right HVAC or Plumbing or as an Electrical repair guide. Select one repair guide for only \$39.95 per month, select two repair guides for only \$69.95 per month, or select all three guides for only \$79.95 per month, a 12-month subscription. <i>Includes upload data for QuickBooks™ or for your field management software.</i> Subscription consists of the following online training and resources:</p> <ul style="list-style-type: none"> • Technician Fix-Right Flat Rate USER Instructions. • Professional service call handling process. • Technician Service Call Handling Soft Skills for Proper Customer Communications. 	\$39.95/M onth To \$79.95/M onth
Product ID 1002	<p><i>Technician/Installer Onsite Hourly Truck and Travel Costs & Pricing Calculator Program in MS Excel</i> This document is used by service and replacement management to calculate the upfront per trip truck and travel rate for your upfront repair and replacement price guides. This document is provided in MS Excel format with results printed on your local printer.</p>	\$69.95

2. 1-hour part-two:

- a. Commercial HVAC Service Agreement Pricing Method.
- b. Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.
- c. Locking in Projected Repair Revenue Pricing Strategy Review.
- d. Subscription provided or purchase these documents:**

Product ID 1003	<i>EasyPrice Service Agreement Sales Call Opportunity Assessment Form</i> Mechanical rooms or central plant areas are logical starting points for multi-facility or multi-story facilities. Starting at the mechanical room or central plant gives the salesperson a better picture of how the conditioned air or water is distributed throughout the facility(s). Understanding how the HVAC/R system is distributed enables the salesperson to look for and ask pertinent questions related to system operating and maintenance tasking requirements.	\$99.95
1004	<i>EasyPrice Service Agreement Estimating & Pricing Program MS Excel</i> Service managers and commercial Sales Reps use this software to perform the step-by-step functions of a professional service agreement surveying, estimating, and pricing procedure. The benefit objective is to increase profitability by implementing a professional approach to accurately and efficiently gathering customer and scope of work job data, decreasing estimating human errors, reducing work-related risk liabilities, and by improving the customer's understanding how service agreement proposal development standardization increases efficiencies while reducing business risk to the company. Includes a complete set of 72-built-in equipment and filter estimating labor and material standards for packaged RTU, built-up systems, central plant heating/cooling, and associated equipment. This software tool is provided in original MS Excel format.	\$499.95

3. 1-hour part-three:

- a. Selecting Which Project Pricing Method to Use.
- b. Most Common - Single Divisor Project Pricing Method Review.
- c. EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement.
- d. Most Accurate – Project Dual Rate Overhead Project Pricing Method Review.
- e. Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.

Subscription provided or purchase these documents: Product ID	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep: <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. 	\$99.95
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<p>1005</p>	<ul style="list-style-type: none"> • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. <p>To provide the means to complete the sales call and close the transaction in 2 sales calls or less.</p>	
<p>1006</p>	<p><i>EasyPrice Commercial/Industrial Project Single Divisor Pricing Calculator MS Excel</i></p> <p>When setting service pricing for your HVAC business, you need to understand that there are two types of business costs - direct and indirect or overhead costs. Direct costs are the cost of goods sold required to deliver work from a lead to job closeout. It includes parts, equipment, materials, ductwork, permits, labor, and vehicle expenses. Business owners typically price their work where most projects represent 60% or higher in equipment, materials, and subs. On the other hand, the indirect or overhead cost keeps the lights on and sustainable. Your overhead costs include your mortgage/lease/rent, utility expenses, admin and sales salary, uniforms, employee training, and trash removal. You need an accurate pricing method to compete on large or multi-phase jobs. The single divisor pricing method uses an average overhead recovery which can overprice a job.</p>	<p>\$99.95</p>
<p>1007</p>	<p><i>EasyPrice Dual Rate Overhead Project Pricing Calculator MS Excel</i></p> <p>This job pricing method utilizes two overhead rates for subcontractors, equipment, and materials and one for direct labor. The main reason to use this method is that overhead is more accurately distributed based on the percentage of install labor to non-labor and materials direct costs on a job. Overhead is allocated higher for projects with a large proportion of the job is installation labor versus equipment, materials, and subcontracts. Overheads are less where installation labor is small than non-labor and direct material costs.</p>	<p>\$99.95</p>

#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part one:

- a. Segmenting Commercial HVAC Markets is More Effective than Generic Marketing.
- b. Medium and Large Government Building Buyer Profile & Sales Positioning.
- c. Commercial Building Buyer Profile & Sales Positioning.
- d. Industrial Building Buyer Profile & Sales Positioning.
- e. College/University Building Buyer Profile & Sales Positioning.
- f. Healthcare Building Buyer Profile & Sales Positioning.
- g. Understanding Building Owner/Operator Roles & Responsibilities.
- h. **Subscription provided or purchase these documents:**

Product ID 2007	<p>Receive the industry Profiles and Understanding Building Owner/Operator Roles & Responsibilities profiles in MS Word</p> <p>This document provides you with all industry profiles as well as the buyer job responsibilities and duties profile as shown in course and enables you to add other industries or update the provided industry and client buyer job description profiles.</p>	\$99.95
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2. 1-hour part two:

- a. An Effective Step-by-Step Commercial Lead Generation Strategy and Tactical Plan.
- b. Overcome Common Commercial HVAC Sales Objections.
- c. The 10 Commandments of Time Management.
- d. Organization Option for Implementing Commercial Lead Generation.

e. Subscription provided or purchase these documents:

Product ID 1008	<p>Commercial HVAC Contractor Introduction Letter & Line Card Templates</p> <p>You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM & Customized letter & line Card to better Position the company as an industry HVAC expert.</p>	\$99.95
1009	<p>Commercial Lead Generation Outbound Sales Call Script</p> <p>Lead generation is about building your customer base by retaining and adding new customers. Lead generation is an essential business process to consistently acquire new commercial business through the design, production, and direct marketing tasking efforts within your sales area. Marketing is the same thing as lead generation, which is the process of systematic customer awareness communications. The process involves using a 12-step lead generation implementation plan:</p> <ul style="list-style-type: none"> 13. Identify capabilities as derived by you and your staff's experience and expertise. 14. Identify packages of offerings based on your staff capabilities. 15. Identify target markets that fit your capabilities. 16. Obtain a target commercial business list of owner-occupied industries. 17. Import into a contact management program (e.g., Outlook). 18. Set specific weekly goals for the number of prospects contacted, called, mailed & follow-up. 19. Set specific weekly new business appointments. 20. Clean target group list with decision makers names. 21. Mail introduction letter and line card. 22. Follow-up to identify client scope of work and develop proposals. 23. Set an appointment to present and close the business. 24. Reporting lead generation performance to a business development plan. 	\$99.95

Product ID	<p>Performance Tasking & Quota Tracking & Reporting in MS Excel</p> <p>To report Actual Sales Tasking Plan to Quota Performance for:</p> <ul style="list-style-type: none"> • Sales Tasking Quotas - It is the Sales Manager identifies that sets Sales Rep tasking plan quotas for service agreements and jobs by individual Sales Reps. • Demand Service Performance Measurement - At the end of each day/week, the Sales Rep's total actual new account Demand Service and total sold to date are tracked by Service Manager and reported to the Sales Rep and the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Service Agreement Performance Measurement - At the end of each day/week, the Sales Rep's total actual Service Agreements and total Service Agreements sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Project Performance Measurement - At the end of each day/week, the Sales Rep's total actual Projects and total Projects sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. 	\$99.95
1010		

3. 1-hour part three:

- a. Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- b. Technician Repair Call Check-in Opportunity Assessment Forms.
- c. Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. Subscription provided or purchase these documents:

Product ID	<p>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</p> <p>This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep:</p> <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. • To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	\$99.95
1011		

Product ID 1012	Technician Repair Call Check-in Opportunity Assessment Form In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form	\$99.95
1013	Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled System Condition Report . This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. 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.	\$99.95

4. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID 1018	Service Agreement Sales First Call Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
1019	Commercial Service Agreement Short Form & Long Form Proposal Templates Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95

Product ID 1020	Project/Design-Build Sales First Call Sales Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for project 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 after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
Product ID 1022	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#3 How to Win More Business by Differentiating Your Services

1. 1-hour part one:

- a. Review of purpose and how to create powerful service brand names.
- d. Example Design-Build Project Brand & Associated Value Positioning Statement.

e. Subscription provided or purchase these documents:

Product ID 1009	Contents of this course provided in MS Word You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM & Customized letter & line Card to better Position the company as an industry HVAC expert.	\$99.95
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#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part one:

- f. Sales Objections Always Fall into 1 of 5 Categories.
- g. The 4-Step Consultative Trust Selling Approach.
- h. Proactive Repair Trust-Selling Standard Procedures.
- i. Proactive Service Agreement Trust-Selling Standard Procedures.
- j. Types of Commercial Service Agreement Inspection & Repair Coverages.

- k. Service Agreement Maintenance Options.
- l. Pros & Cons by Service Agreement Type of Coverage.

m. Subscription provided or purchase these documents:

Product ID 1014	<i>Proactive Repair Call Handling Tasking Procedures</i> 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 MS Word format to be printed on your local printer.	\$99.95
Product ID 1015	<i>Proactive Service Agreement Sales Call Handling Tasking Procedures</i> Service managers and commercial Sales Reps use this standard procedure document to perform the step-by-step functions of a professional service agreement call handling step-by-step procedure from a lead to sold agreement. This document is provided in original MS Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95
Product ID 1018	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95

2. 1-hour part two:

- a. Proactive Service Agreement Trust-Selling Standard Procedures.
- b. Example: Commercial Service Agreement Long Form Maintenance Agreement.

c. Subscription provided or purchase these documents:

Product ID 1019	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
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3. 1-hour part three:

- a. Proactive Project/Design-Build Trust-Selling Standards Procedures.
- b. Example: Design-Build/Project Cover letter and Proposal Agreement.
- c. Creating a Project/Design-Build Statement of Qualifications.
- d. Example: Cover Letter and Statement of Qualifications.

e. Subscription provided or purchase these documents:

Product ID 1020	Project/Design-Build Sales First Call Sales Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for project 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 after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
Product ID 1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

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

1. 1-hour part one:

- f. Advantages of Work Delivery Tasking Standards.
- g. Business Functions are the Labor Tasking Activities That Must Occur.
- h. Service Repair Work Delivery Tasking Standard Procedures.
- i. **Subscription provided or purchase these documents:**
- j.

Product ID 1023	Service Repair Work Delivery Standard Procedures 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 MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part two:

- a. Service Agreement Work Delivery Tasking Standard Procedures.
- b. Example: Commercial Service Agreement Cover letter and Proposal Agreement.
- c. **Subscription provided or purchase these documents:**

Product ID 1024	Service Agreement Work Delivery Standard Procedures 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 MS Word format to be printed on your local printer.	\$159.95
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3. 1-hour part three:

- a. Project/Design-Build Work Delivery Standards Procedures.

a. Subscription provided or purchase these documents:

Product ID 1025	Project/Design-Build 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 MS Word format to be printed on your local printer.	\$159.95
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4. 1-hour part four:

- b. Equipment Start-up and Maintenance Tasking Standards.
- c. Management Quality Assurance Standard Procedures.
- d. Accounts Receivable and Payable Standard Procedures.

e. Subscription provided or purchase these documents:

Product ID 1026	Equipment Start-up & Maintenance Tasking Procedures 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 MS Word format to be printed on your local printer.	\$159.95
1027	Accounts Receivable and Payable Standard Procedures Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

5. 1-hour part five:

- f. Inventory & Tool Control Standards Procedures.
- g. Customer Care Call Handling Standard Procedures.
- h. Customer Billing Standards.

i. Subscription provided or purchase these documents:

Product ID 1028	<i>Inventory and Tool Control Standards</i> Includes step-by-step company job and truck inventory control standards. General managers, service managers, and operations managers use them. This document is provided in original MS Word format to be printed on your local printer..	\$99.95
Product ID 1029	<i>Effective Customer Care Call Handling Standard Procedures</i> Arming the dispatcher with a professional standardized way to greet and respond to customer inquiries to include: <ul style="list-style-type: none"> • Greeting the Customer • Identify How Customer Will Pay for Today's Work • Informing the Customer of Response Time: • Identifying the Lead Source • Reminding the Customer of What Happens Next • Calling the Customer to Confirm Arrival Time • Calling to Reschedule Appointment • If a Solution Requires a Plan • Callback With a Plan 	\$99.95

6. 1-hour part six:

- j. Field Labor Productivity Optimization Standards.
- k. Service Reporting Standard Procedures.

l. Subscription provided or purchase these documents:

- i. N/A

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. Subscription provided or purchase these documents:

Product ID 1030	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i> 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 part one:

- a. Five Business Processes That Positively Affect Employee Retention.
- b. Implementing Step-by-Step Work Delivery Standard Procedures.
- c. **Subscription provided or purchase these documents:**

- i. N/A

2. 1-hour part two:

- a. Implement Performance-Based Job Descriptions.
- b. Implementing Labor Billable Efficiency & Productivity Monitoring.
- c. **Subscription provided or purchase these documents:**

Product ID 1032	<i>Performance Incentive plan - Office, Technicians & Installer</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1033	<i>Performance Incentive plan - Commercial Sales Rep</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1031	<i>Complete Set Performance-Based Job Descriptions</i> These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These documents are provided in MS Word format to be printed on your local printer. Set includes: <ul style="list-style-type: none"> ● Dispatcher Job Description ● Commercial Sales Rep 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 	\$99.95

3. **1-hour part three:**
 - d. Implement Performance Incentive Plans.
 - e. Implementing a Company Culture of Success.
 - f. **Subscription provided or purchase these documents:**
 - i. N/A

#8 How to Drive Profitability Using Key Performance Indicators

1. **1-hour:**
 - a. Keep your Business on Track Using KPIs.
 - b. Establishing Financial & Labor KPIs.
 - c. Common Industry Average Financial KPIs.
 - d. Drive Profitability Using Financial KPIs.
 - e. Using Rules-Based Management to Drive Financial KPIs.
 - f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
 - g. **Subscription provided or purchase these documents:**
 - i. N/A

#9 How to Efficiently Organize the Business for Growth

1. **1-hour:**
 - a. Why We Need to Organize Business into Groups.
 - b. Commercial HVAC Business Organizational Structure.
 - c. Five Logical Commercial Organizational Groups/Departments.
 - d. Office Admin Department Functions & Organizational Structure.
 - e. Sales Department Functions & Organizational Structure Service.
 - f. Service Functions & Organizational Structure.
 - g. Installation Department Functions & Organizational Structure.
 - h. Construction Department Functions & Organizational Structure.
 - i. **Subscription provided or purchase these documents:**

Product ID 1036	Commercial HVAC Service Contractor Organizational Charts Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company's book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all commercial HVAC companies should be organized in such a way as to compete competitively.	\$69.95
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#10 How to Implement Proper Customer Care Call Handling Procedures

1. 1-hour:

- a. Importance of Good Customer Care.
- b. Customer Care Inbound and Outbound Call Handling Script.
- c. Crucial Hiring Criteria for the Customer Care & Dispatcher Function.
- d. Organizing an Office Central Filing System.
- e. Implement Hiring Guidelines for the Customer Care/Dispatch Function.
- f. Customer Service 101: Proper Phone Etiquette.
- g. Implement Training for the Customer Care/Dispatch Function.

h. Subscription provided or purchase these documents:

Product ID 1034	Customer Care Call Handling Inbound and Outbound Script This script includes a professional standardized way to greet and responds to the customer inquiries. The script includes greeting the customer, identifying if they are interested in a service agreement, annual service agreement renewal reminder, identifying how the customer they pay for today's work, informing the customer of response time, identifying the lead source, calling the customer to confirm arrival time, managing the price of today's service, calling to reschedule an appointment, handling upset callers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
Product ID 1035	Customer Care Response for "Price is Too High" Objection Used by customer care, receptionist, and dispatchers. This document is designed to inform employees and your customers why we price our services, justifying the price to the customer post service. Includes a professional standardized way to respond to a price objection via letter or email. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#11 How to Forecast Your Monthly Spend Plan

1. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.

c. Using BudgetPro to Develop Service Offerings Spend Plans.

d. Subscription provided or purchase these documents:

Product ID 1039	BudgetPro Annual & Monthly Budgeting Calculator One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	\$159.95
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#12 How to Recruit and Retain Top Performers

1. 1-hour part one:

- a. Proven Strategies to Help You Recruit the Best.
- b. Proven Strategies to Help You Retain the Best.
- c. Why Contractors are Making Bad Hiring Decisions.
- d. The Many Costs of Making a Bad Hire.
- e. Here are 9-Tips for Hiring the Right Candidate.
- f. Checklist for Hiring Employees.
- g. Checklist for Screening an Applicant Resume.

h. Subscription provided or purchase these documents:

i. N/A

2. 1-hour part two:

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.
- e. **Subscription provided or purchase these documents:**

Product ID 1037	Employment Application 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 MS Word format to be printed on your local printer.	\$69.95
1038	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#13 How to Select and Implement Field Management Software

1. 1-hour:

- a. Benefits of Field Service Management Software.
- b. Checklist for Selecting Field Service Management Software.
- c. **Subscription provided or purchase these documents:**
 - i. N/A

#14 How to Self-Develop Your Leadership and People Skills

1. 1-hour:

- a. Different Leadership Styles and When to Use Them.
- b. The Top Leadership Skills to Improve.
- c. Implement Your Leadership Skill Self-Development Plan.
- d. **Subscription provided or purchase these documents:**
 - ii. N/A

Marketing Manager Job Training Track

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.

f. **Subscription provided or purchase these documents:**

i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-two:

- a. Commercial HVAC Service Agreement Pricing Method.
- b. Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.
- c. Locking in Projected Repair Revenue Pricing Strategy Review.

d. Subscription provided or purchase these documents:

e.

Product ID 1003	EasyPrice Service Agreement Sales Call Opportunity Assessment Form Mechanical rooms or central plant areas are logical starting points for multi-facility or multi-story facilities. Starting at the mechanical room or central plant gives the salesperson a better picture of how the conditioned air or water is distributed throughout the facility(s). Understanding how the HVAC/R system is distributed enables the salesperson to look for and ask pertinent questions related to system operating and maintenance tasking requirements.	\$99.95
1004	EasyPrice Service Agreement Estimating & Pricing Program MS Excel Service managers and commercial Sales Reps use this software to perform the step-by-step functions of a professional service agreement surveying, estimating, and pricing procedure. The benefit objective is to increase profitability by implementing a professional approach to accurately and efficiently gathering customer and scope of work job data, decreasing estimating human errors, reducing work-related risk liabilities, and by improving the customer’s understanding how service agreement proposal development standardization increases efficiencies while reducing business risk to the company. Includes a complete set of 72-built-in equipment and filter estimating labor and material standards for packaged RTU, built-up systems, central plant heating/cooling, and associated equipment. This software tool is provided in original MS Excel format.	\$499.95

#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part one:

- a. Segmenting Commercial HVAC Markets is More Effective than Generic Marketing.
- b. Medium and Large Government Building Buyer Profile & Sales Positioning.
- c. Commercial Building Buyer Profile & Sales Positioning.
- d. Industrial Building Buyer Profile & Sales Positioning.
- e. College/University Building Buyer Profile & Sales Positioning.
- f. Healthcare Building Buyer Profile & Sales Positioning.
- g. Understanding Building Owner/Operator Roles & Responsibilities.

h. Subscription provided or purchase these documents:

Product ID 2007	<p><i>Receive the industry Profiles and Understanding Building Owner/Operator Roles & Responsibilities profiles in MS Word</i></p> <p>This document provides you with all industry profiles as well as the buyer job responsibilities and duties profile as shown in course and enables you to add other industries or update the provided industry and client buyer job description profiles.</p>	\$99.95
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2. 1-hour part two:

- a. An Effective Step-by-Step Commercial Lead Generation Strategy and Tactical Plan.
- b. Overcome Common Commercial HVAC Sales Objections.
- c. The 10 Commandments of Time Management.
- d. Organization Option for Implementing Commercial Lead Generation.

e. Subscription provided or purchase these documents:

Product ID 1008	<p><i>Commercial HVAC Contractor Introduction Letter & Line Card Templates</i></p> <p>You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM & Customized letter & line Card to better Position the company as an industry HVAC expert.</p>	\$99.95
Product ID 1009	<p><i>Commercial Lead Generation Outbound Sales Call Script</i></p> <p>Lead generation is about building your customer base by retaining and adding new customers. Lead generation is an essential business process to consistently acquire new commercial business through the design, production, and direct marketing tasking efforts within your sales area. Marketing is the same thing as lead generation, which is the process of systematic customer awareness communications. The process involves using a 12-step lead generation implementation plan:</p> <ul style="list-style-type: none"> 25. Identify capabilities as derived by you and your staff's experience and expertise. 26. Identify packages of offerings based on your staff capabilities. 27. Identify target markets that fit your capabilities. 28. Obtain a target commercial business list of owner-occupied industries. 29. Import into a contact management program (e.g., Outlook). 30. Set specific weekly goals for the number of prospects contacted, called, mailed & follow-up. 31. Set specific weekly new business appointments. 32. Clean target group list with decision makers names. 33. Mail introduction letter and line card. 34. Follow-up to identify client scope of work and develop proposals. 35. Set an appointment to present and close the business. 36. Reporting lead generation performance to a business development plan. 	\$99.95

Product ID	Performance Tasking & Quota Tracking & Reporting in MS Excel	
1010	<p>To report Actual Sales Tasking Plan to Quota Performance for:</p> <ul style="list-style-type: none"> • Sales Tasking Quotas - It is the Sales Manager identifies that sets Sales Rep tasking plan quotas for service agreements and jobs by individual Sales Reps. • Demand Service Performance Measurement - At the end of each day/week, the Sales Rep's total actual new account Demand Service and total sold to date are tracked by Service Manager and reported to the Sales Rep and the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Service Agreement Performance Measurement - At the end of each day/week, the Sales Rep's total actual Service Agreements and total Service Agreements sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Project Performance Measurement - At the end of each day/week, the Sales Rep's total actual Projects and total Projects sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. 	\$99.95

3. 1-hour part three:

- a. Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- b. Technician Repair Call Check-in Opportunity Assessment Forms.
- c. Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. Subscription provided or purchase these documents:

Product ID	Install-Right Project/Design-Build Sales Call Opportunity Assessment Form	
1011	<p>This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep:</p> <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. • To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	\$99.95
Product ID	Technician Repair Call Check-in Opportunity Assessment Form	
	In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the	

1012	patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form	\$99.95
1013	Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled System Condition Report . This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. 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.	\$99.95

4. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID 1018	Service Agreement Sales First Call Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
1019	Commercial Service Agreement Short Form & Long Form Proposal Templates Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95

Product ID 1020	Project/Design-Build Sales First Call Sales Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for project 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 after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
Product ID 1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
Product ID 1022	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#3 How to Win More Business by Differentiating Your Services

1. 1-hour:

- a. Review of purpose and how to create powerful service brand names.
- d. Example Design-Build Project Brand & Associated Value Positioning Statement.

e. Subscription provided or purchase these documents:

Product ID 1009	Contents of this course provided in MS Word You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM & Customized letter & line Card to better Position the company as an industry HVAC expert.	\$99.95
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#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part one:

- f. Sales Objections Always Fall into 1 of 5 Categories.
- g. The 4-Step Consultative Trust Selling Approach.
- h. Proactive Repair Trust-Selling Standard Procedures.
- i. Proactive Service Agreement Trust-Selling Standard Procedures.
- j. Types of Commercial Service Agreement Inspection & Repair Coverages.

- k. Service Agreement Maintenance Options.
- l. Pros & Cons by Service Agreement Type of Coverage.

m. Subscription provided or purchase these documents:

Product ID 1014	<i>Proactive Repair Call Handling Tasking Procedures</i> 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 MS Word format to be printed on your local printer.	\$99.95
1015	<i>Proactive Service Agreement Sales Call Handling Tasking Procedures</i> Service managers and commercial Sales Reps use this standard procedure document to perform the step-by-step functions of a professional service agreement call handling step-by-step procedure from a lead to sold agreement. This document is provided in original MS Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95
Product ID 1018	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95

2. 1-hour part two:

- a. Proactive Service Agreement Trust-Selling Standard Procedures.
- b. Example: Commercial Service Agreement Long Form Maintenance Agreement.

c. Subscription provided or purchase these documents:

Product ID 1019	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
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3. 1-hour part three:

- a. Proactive Project/Design-Build Trust-Selling Standards Procedures.
- b. Example: Design-Build/Project Cover letter and Proposal Agreement.
- c. Creating a Project/Design-Build Statement of Qualifications.
- d. Example: Cover Letter and Statement of Qualifications.

e. Subscription provided or purchase these documents:

<p>Product ID 1020</p>	<p><i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project 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 after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.</p>	<p>\$99.95</p>
<p>Product ID 1021</p>	<p><i>Project/Design-Build Agreement Proposal Template</i> Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.</p>	<p>\$99.95</p>
<p>1022</p>	<p><i>Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word</i> A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include:</p> <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	<p>\$99.95</p>

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

7. 1-hour part six:

- m. Field Labor Productivity Optimization Standards.
- n. Service Reporting Standard Procedures.

o. Subscription provided or purchase these documents:

- i. N/A

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. Subscription provided or purchase these documents:

Product ID 1030	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i> 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 part one:

- a. Five Business Processes That Positively Affect Employee Retention.
- b. Implementing Step-by-Step Work Delivery Standard Procedures.
- c. **Subscription provided or purchase these documents:**

ii. N/A

2. 1-hour part two:

- a. Implement Performance-Based Job Descriptions.
- b. Implementing Labor Billable Efficiency & Productivity Monitoring.
- c. **Subscription provided or purchase these documents:**

Product ID 1032	<i>Performance Incentive plan - Office, Technicians & Installer</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1033	<i>Performance Incentive plan - Commercial Sales Rep</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

<p>Product ID</p> <p>1031</p>	<p>Complete Set Performance-Based Job Descriptions</p> <p>These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These documents are provided in MS Word format to be printed on your local printer. Set includes:</p> <ul style="list-style-type: none"> • Dispatcher Job Description • Commercial Sales Rep 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>
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3. 1-hour part three:

- d. Implement Performance Incentive Plans.
- e. Implementing a Company Culture of Success.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#8 How to Drive Profitability Using Key Performance Indicators

2. 1-hour:

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.
- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
- g. **Subscription provided or purchase these documents:**
 - i. N/A

#9 How to Efficiently Organize the Business for Growth

1. 1-hour:

- a. Why We Need to Organize Business into Groups.
- b. Commercial HVAC Business Organizational Structure.
- c. Five Logical Commercial Organizational Groups/Departments.
- d. Office Admin Department Functions & Organizational Structure.
- e. Sales Department Functions & Organizational Structure Service.
- f. Service Functions & Organizational Structure.
- g. Installation Department Functions & Organizational Structure.
- h. Construction Department Functions & Organizational Structure.
- i. Subscription provided or purchase these documents:**

Product ID 1036	<i>Commercial HVAC Service Contractor Organizational Charts</i> Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company's book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all commercial HVAC companies should be organized in such a way as to compete competitively.	\$69.95
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#10 How to Implement Proper Customer Care Call Handling Procedures

1. 1-hour:

- a. Importance of Good Customer Care.
- b. Customer Care Inbound and Outbound Call Handling Script.
- c. Crucial Hiring Criteria for the Customer Care & Dispatcher Function.
- d. Organizing an Office Central Filing System.
- e. Implement Hiring Guidelines for the Customer Care/Dispatch Function.
- f. Customer Service 101: Proper Phone Etiquette.
- g. Implement Training for the Customer Care/Dispatch Function.
- h. Subscription provided or purchase these documents:**

Product ID 1034	Customer Care Call Handling Inbound and Outbound Script This script includes a professional standardized way to greet and responds to the customer inquiries. The script includes greeting the customer, identifying if they are interested in a service agreement, annual service agreement renewal reminder, identifying how the customer they pay for today's work, informing the customer of response time, identifying the lead source, calling the customer to confirm arrival time, managing the price of today's service, calling to reschedule an appointment, handling upset callers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1035	Customer Care Response for "Price is Too High" Objection Used by customer care, receptionist, and dispatchers. This document is designed to inform employees and your customers why we price our services, justifying the price to the customer post service. Includes a professional standardized way to respond to a price objection via letter or email. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#11 How to Forecast Your Monthly Spend Plan

1. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.

d. Subscription provided or purchase these documents:

e.

Product ID 1039	BudgetPro Annual & Monthly Budgeting Calculator One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	\$159.95
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#12 How to Recruit and Retain Top Performers

1. 1-hour part one:

- a. Proven Strategies to Help You Recruit the Best.
- b. Proven Strategies to Help You Retain the Best.
- c. Why Contractors are Making Bad Hiring Decisions.
- d. The Many Costs of Making a Bad Hire.

- e. Here are 9-Tips for Hiring the Right Candidate.
- f. Checklist for Hiring Employees.
- g. Checklist for Screening an Applicant Resume.
- h. Subscription provided or purchase these documents:**
 - i. N/A

2. 1-hour part two:

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.
- e. Subscription provided or purchase these documents:**

Product ID 1037	Employment Application 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 MS Word format to be printed on your local printer.	\$69.95
1038	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#13 How to Select and Implement Field Management Software

1. 1-hour:

- a. Benefits of Field Service Management Software.
- b. Checklist for Selecting Field Service Management Software.
- c. Subscription provided or purchase these documents:**
 - i. N/A

#14 How to Self-Develop Your Leadership and People Skills

1. 1-hour:

- a. Different Leadership Styles and When to Use Them.
- b. The Top Leadership Skills to Improve.

- c. Implement Your Leadership Skill Self-Development Plan.
- d. **Subscription provided or purchase these documents: N/A**

Office Manager Job Training Track

NOTE: To order documents, go to www.WendellBedell.com.

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

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

1. 1-hour part one:

- f. Advantages of Work Delivery Tasking Standards.
- g. Business Functions are the Labor Tasking Activities That Must Occur.
- h. Service Repair Work Delivery Tasking Standard Procedures.
- i. **Subscription provided or purchase these documents:**

Product ID 1023	<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 MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part five:

- p. Inventory & Tool Control Standards Procedures.
- q. Customer Care Call Handling Standard Procedures.
- r. Customer Billing Standards.

s. Subscription provided or purchase these documents:

Product ID 1028	<i>Inventory and Tool Control Standards</i> Includes step-by-step company job and truck inventory control standards. General managers, service managers, and operations managers use them. This document is provided in original MS Word format to be printed on your local printer..	\$99.95
Product ID 1029	<i>Effective Customer Care Call Handling Standard Procedures</i> Arming the dispatcher with a professional standardized way to greet and respond to customer inquiries to include: <ul style="list-style-type: none"> • Greeting the Customer • Identify How Customer Will Pay for Today’s Work • Informing the Customer of Response Time: • Identifying the Lead Source • Reminding the Customer of What Happens Next • Calling the Customer to Confirm Arrival Time • Calling to Reschedule Appointment • If a Solution Requires a Plan • Callback With a Plan 	\$99.95

3. 1-hour part six:

- t. Field Labor Productivity Optimization Standards.
- u. Service Reporting Standard Procedures.

v. Subscription provided or purchase these documents:

- i. N/A

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. Subscription provided or purchase these documents:

Product ID 1030	Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set 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 part one:

- a. Five Business Processes That Positively Affect Employee Retention.
- b. Implementing Step-by-Step Work Delivery Standard Procedures.
- c. **Subscription provided or purchase these documents:**
 - iii. N/A

2. 1-hour part two:

- a. Implement Performance-Based Job Descriptions.
- b. Implementing Labor Billable Efficiency & Productivity Monitoring.
- c. **Subscription provided or purchase these documents:**

Product ID 1032	Performance Incentive plan - Office, Technicians & Installer Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1033	Performance Incentive plan - Commercial Sales Rep Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1031	Complete Set Performance-Based Job Descriptions These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These documents are provided in MS Word format to be printed on your local printer. Set includes: <ul style="list-style-type: none"> ● Dispatcher Job Description ● Commercial Sales Rep 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 	\$99.95

	<ul style="list-style-type: none"> ● 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 	
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#9 How to Efficiently Organize the Business for Growth

1. 1-hour:

- a. Why We Need to Organize Business into Groups.
- b. Commercial HVAC Business Organizational Structure.
- c. Five Logical Commercial Organizational Groups/Departments.
- d. Office Admin Department Functions & Organizational Structure.
- e. Sales Department Functions & Organizational Structure Service.
- f. Service Functions & Organizational Structure.
- g. Installation Department Functions & Organizational Structure.
- h. Construction Department Functions & Organizational Structure.
- i. Subscription provided or purchase these documents:**

Product ID	<p><i>Commercial HVAC Service Contractor Organizational Charts</i></p> <p>Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company’s book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all commercial HVAC companies should be organized in such a way as to compete competitively.</p>	\$69.95
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#10 How to Implement Proper Customer Care Call Handling Procedures

1. 1-hour:

- a. Importance of Good Customer Care.
- b. Customer Care Inbound and Outbound Call Handling Script.
- c. Crucial Hiring Criteria for the Customer Care & Dispatcher Function.
- d. Organizing an Office Central Filing System.
- e. Implement Hiring Guidelines for the Customer Care/Dispatch Function.
- f. Customer Service 101: Proper Phone Etiquette.
- g. Implement Training for the Customer Care/Dispatch Function.

h. Subscription provided or purchase these documents:

Product ID 1034	<i>Customer Care Call Handling Inbound and Outbound Script</i> This script includes a professional standardized way to greet and responds to the customer inquiries. The script includes greeting the customer, identifying if they are interested in a service agreement, annual service agreement renewal reminder, identifying how the customer they pay for today's work, informing the customer of response time, identifying the lead source, calling the customer to confirm arrival time, managing the price of today's service, calling to reschedule an appointment, handling upset callers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
Product ID 1035	<i>Customer Care Response for "Price is Too High" Objection</i> Used by customer care, receptionist, and dispatchers. This document is designed to inform employees and your customers why we price our services, justifying the price to the customer post service. Includes a professional standardized way to respond to a price objection via letter or email. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#11 How to Forecast Your Monthly Spend Plan

1. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.

d. Subscription provided or purchase these documents:

Product ID 1039	BudgetPro Annual & Monthly Budgeting Calculator One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	\$159.95
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#12 How to Recruit and Retain Top Performers

1. 1-hour part one:

- a. Proven Strategies to Help You Recruit the Best.
- b. Proven Strategies to Help You Retain the Best.
- c. Why Contractors are Making Bad Hiring Decisions.
- d. The Many Costs of Making a Bad Hire.
- e. Here are 9-Tips for Hiring the Right Candidate.
- f. Checklist for Hiring Employees.
- g. Checklist for Screening an Applicant Resume.
- h. Subscription provided or purchase these documents:**
 - i. N/A

2. 1-hour part two:

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.
- e. Subscription provided or purchase these documents:**

Product ID 1037	Employment Application 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 MS Word format to be printed on your local printer.	\$69.95
1038	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#13 How to Select and Implement Field Management Software

1. **1-hour:**

- a. Benefits of Field Service Management Software.
- b. Checklist for Selecting Field Service Management Software.
- c. **Subscription provided or purchase these documents:**
 - i. N/A

#14 How to Self-Develop Your Leadership and People Skills

1. **1-hour:**

- a. Different Leadership Styles and When to Use Them.
- b. The Top Leadership Skills to Improve.
- c. Implement Your Leadership Skill Self-Development Plan.
- d. **Subscription provided or purchase these documents:**
 - ii. N/A

Receptionist Job Training Track

NOTE: To order documents, go to www.WendellBedell.com.

Pilot - How to Master a Thriving Commercial HVAC Service Business

2. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

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

1. 1-hour part one:

- j. Advantages of Work Delivery Tasking Standards.
- k. Business Functions are the Labor Tasking Activities That Must Occur.
- l. Service Repair Work Delivery Tasking Standard Procedures.
- m. **Subscription provided or purchase these documents:**

Product ID 1023	Service Repair Work Delivery Standard Procedures 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 MS Word format to be printed on your local printer.	\$159.95
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#10 How to Implement Proper Customer Care Call Handling Procedures

1. 1-hour:

- a. Importance of Good Customer Care.
- b. Customer Care Inbound and Outbound Call Handling Script.
- c. Crucial Hiring Criteria for the Customer Care & Dispatcher Function.
- d. Organizing an Office Central Filing System.
- e. Implement Hiring Guidelines for the Customer Care/Dispatch Function.
- f. Customer Service 101: Proper Phone Etiquette.

g. Implement Training for the Customer Care/Dispatch Function.

h. Subscription provided or purchase these documents:

<p>Product ID 1034</p>	<p><i>Customer Care Call Handling Inbound and Outbound Script</i> This script includes a professional standardized way to greet and responds to the customer inquiries. The script includes greeting the customer, identifying if they are interested in a service agreement, annual service agreement renewal reminder, identifying how the customer they pay for today’s work, informing the customer of response time, identifying the lead source, calling the customer to confirm arrival time, managing the price of today’s service, calling to reschedule an appointment, handling upset callers. This document is provided in original MS Word format to be printed on your local printer.</p>	<p>\$69.95</p>
<p>1035</p>	<p><i>Customer Care Response for “Price is Too High” Objection</i> Used by customer care, receptionist, and dispatchers. This document is designed to inform employees and your customers why we price our services, justifying the price to the customer post service. Includes a professional standardized way to respond to a price objection via letter or email. This document is provided in original MS Word format to be printed on your local printer.</p>	<p>\$69.95</p>

Bookkeeper Job Training Track

NOTE: To order documents, go to www.WendellBedell.com.

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

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

1. 1-hour part one:

- a. Advantages of Work Delivery Tasking Standards.
- b. Business Functions are the Labor Tasking Activities That Must Occur.
- c. Service Repair Work Delivery Tasking Standard Procedures.
- d. **Subscription provided or purchase these documents:**

Product ID 1023	Service Repair Work Delivery Standard Procedures 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 MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part four:

- a. Equipment Start-up and Maintenance Tasking Standards.
- b. Management Quality Assurance Standard Procedures.
- c. Accounts Receivable and Payable Standard Procedures.
- d. **Subscription provided or purchase these documents:**

<p>Product ID</p> <p>1026</p>	<p>Equipment Start-up & Maintenance Tasking Procedures 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 MS Word format to be printed on your local printer.</p>	<p>\$159.95</p>
<p>1027</p>	<p>Accounts Receivable and Payable Standard Procedures Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.</p>	<p>\$99.95</p>

#8 How to Drive Profitability Using Key Performance Indicators

1. 1-hour:

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.
- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
- d. **Subscription provided or purchase these documents:**
 - i. N/A

#11 How to Forecast Your Monthly Spend Plan

2. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.
- d. **Subscription provided or purchase these documents:**

<p>Product ID</p> <p>1039</p>	<p>BudgetPro Annual & Monthly Budgeting Calculator</p> <p>One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.</p>	<p>\$159.95</p>
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Accounting Job Training Track

NOTE: To order documents, go to www.WendellBedell.com.

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

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

3. 1-hour part one:

- g. Advantages of Work Delivery Tasking Standards.
- h. Business Functions are the Labor Tasking Activities That Must Occur.
- i. Service Repair Work Delivery Tasking Standard Procedures.
- j. **Subscription provided or purchase these documents:**

Product ID 1023	Service Repair Work Delivery Standard Procedures 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 MS Word format to be printed on your local printer.	\$159.95
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4. 1-hour part four:

- w. Equipment Start-up and Maintenance Tasking Standards.
- x. Management Quality Assurance Standard Procedures.
- y. Accounts Receivable and Payable Standard Procedures.
- z. **Subscription provided or purchase these documents:**

<p>Product ID</p> <p>1026</p>	<p>Equipment Start-up & Maintenance Tasking Procedures</p> <p>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 MS Word format to be printed on your local printer.</p>	<p>\$159.95</p>
<p>1027</p>	<p>Accounts Receivable and Payable Standard Procedures</p> <p>Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.</p>	<p>\$99.95</p>

#8 How to Drive Profitability Using Key Performance Indicators

1. 1-hour:

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.
- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
- e. **Subscription provided or purchase these documents:**
 - i. N/A

#11 How to Forecast Your Monthly Spend Plan

1. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.
- d. **Subscription provided or purchase these documents:**

<p>Product ID</p> <p>1039</p>	<p>BudgetPro Annual & Monthly Budgeting Calculator</p> <p>One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.</p>	<p>\$159.95</p>
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Sales Manager Job Training Track

NOTE: To order documents, go to www.WendellBedell.com.

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-two:

- a. Commercial HVAC Service Agreement Pricing Method.
- b. Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.
- c. Locking in Projected Repair Revenue Pricing Strategy Review.
- d. **Subscription provided or purchase these documents:**

Product ID 1003	<i>EasyPrice Service Agreement Sales Call Opportunity Assessment Form</i> Mechanical rooms or central plant areas are logical starting points for multi-facility or multi-story facilities. Starting at the mechanical room or central plant gives the salesperson a better picture of how the conditioned air or water is distributed throughout the facility(s). Understanding how the HVAC/R system is distributed enables the salesperson to look for and ask pertinent questions related to system operating and maintenance tasking requirements.	\$99.95
1004	<i>EasyPrice Service Agreement Estimating & Pricing Program MS Excel</i> Service managers and commercial Sales Reps use this software to perform the step-by-step functions of a professional service agreement surveying, estimating, and pricing procedure. The benefit objective is to increase profitability by implementing a professional approach to accurately and efficiently gathering customer and scope of work job data, decreasing estimating human errors, reducing work-related risk liabilities, and by improving the customer's understanding how service agreement proposal development standardization increases efficiencies while reducing business risk to the company. Includes a complete set of 72-built-in equipment and filter estimating labor and material	\$499.95

	standards for packaged RTU, built-up systems, central plant heating/cooling, and associated equipment. This software tool is provided in original MS Excel format.	
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2. 1-hour part-three:

- a. Selecting Which Project Pricing Method to Use.
- b. Most Common - Single Divisor Project Pricing Method Review.
- c. EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement.
- d. Most Accurate – Project Dual Rate Overhead Project Pricing Method Review.
- e. Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.

f. Subscription provided or purchase these documents:

Product ID	<p><i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep:</p> <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. <p>To provide the means to complete the sales call and close the transaction in 2 sales calls or less.</p>	\$99.95
1005		

<p>Product ID</p> <p>1006</p>	<p>EasyPrice Commercial/Industrial Project Single Divisor Pricing Calculator MS Excel</p> <p>When setting service pricing for your HVAC business, you need to understand that there are two types of business costs - direct and indirect or overhead costs. Direct costs are the cost of goods sold required to deliver work from a lead to job closeout. It includes parts, equipment, materials, ductwork, permits, labor, and vehicle expenses. Business owners typically price their work where most projects represent 60% or higher in equipment, materials, and subs. On the other hand, the indirect or overhead cost keeps the lights on and sustainable. Your overhead costs include your mortgage/lease/rent, utility expenses, admin and sales salary, uniforms, employee training, and trash removal. You need an accurate pricing method to compete on large or multi-phase jobs. The single divisor pricing method uses an average overhead recovery which can overprice a job.</p>	<p>\$99.95</p>
<p>Product ID</p> <p>1007</p>	<p>EasyPrice Dual Rate Overhead Project Pricing Calculator MS Excel</p> <p>This job pricing method utilizes two overhead rates for subcontractors, equipment, and materials and one for direct labor. The main reason to use this method is that overhead is more accurately distributed based on the percentage of install labor to non-labor and materials direct costs on a job. Overhead is allocated higher for projects with a large proportion of the job is installation labor versus equipment, materials, and subcontracts. Overheads are less where installation labor is small than non-labor and direct material costs.</p>	<p>\$99.95</p>

#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part one:

- a. Segmenting Commercial HVAC Markets is More Effective than Generic Marketing.
- b. Medium and Large Government Building Buyer Profile & Sales Positioning.
- c. Commercial Building Buyer Profile & Sales Positioning.
- d. Industrial Building Buyer Profile & Sales Positioning.
- e. College/University Building Buyer Profile & Sales Positioning.
- f. Healthcare Building Buyer Profile & Sales Positioning.
- g. Understanding Building Owner/Operator Roles & Responsibilities.
- h. **Subscription provided or purchase these documents:**

<p>Product ID</p> <p>2007</p>	<p>Receive the industry Profiles and Understanding Building Owner/Operator Roles & Responsibilities profiles in MS Word</p> <p>This document provides you with all industry profiles as well as the buyer job responsibilities and duties profile as shown in course and enables you to add other industries or update the provided industry and client buyer job description profiles.</p>	<p>\$99.95</p>
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2. 1-hour part two:

- a. An Effective Step-by-Step Commercial Lead Generation Strategy and Tactical Plan.

- b. Overcome Common Commercial HVAC Sales Objections.
- c. The 10 Commandments of Time Management.
- d. Organization Option for Implementing Commercial Lead Generation.
- e. Subscription provided or purchase these documents:**

Product ID 1008	<p>Commercial HVAC Contractor Introduction Letter & Line Card Templates</p> <p>You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM & Customized letter & line Card to better Position the company as an industry HVAC expert.</p>	\$99.95
Product ID 1009	<p>Commercial Lead Generation Outbound Sales Call Script</p> <p>Lead generation is about building your customer base by retaining and adding new customers. Lead generation is an essential business process to consistently acquire new commercial business through the design, production, and direct marketing tasking efforts within your sales area. Marketing is the same thing as lead generation, which is the process of systematic customer awareness communications. The process involves using a 12-step lead generation implementation plan:</p> <ol style="list-style-type: none"> 37. Identify capabilities as derived by you and your staff's experience and expertise. 38. Identify packages of offerings based on your staff capabilities. 39. Identify target markets that fit your capabilities. 40. Obtain a target commercial business list of owner-occupied industries. 41. Import into a contact management program (e.g., Outlook). 42. Set specific weekly goals for the number of prospects contacted, called, mailed & follow-up. 43. Set specific weekly new business appointments. 44. Clean target group list with decision makers names. 45. Mail introduction letter and line card. 46. Follow-up to identify client scope of work and develop proposals. 47. Set an appointment to present and close the business. 48. Reporting lead generation performance to a business development plan. 	\$99.95
1010	<p>Performance Tasking & Quota Tracking & Reporting in MS Excel</p> <p>To report Actual Sales Tasking Plan to Quota Performance for:</p> <ul style="list-style-type: none"> • Sales Tasking Quotas - It is the Sales Manager identifies that sets Sales Rep tasking plan quotas for service agreements and jobs by individual Sales Reps. • Demand Service Performance Measurement - At the end of each day/week, the Sales Rep's total actual new account Demand Service and total sold to date are tracked by Service Manager and reported to the Sales Rep and the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Service Agreement Performance Measurement - At the end of each day/week, the Sales Rep's total actual Service Agreements and total Service Agreements sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. 	\$99.95

	<ul style="list-style-type: none"> Project Performance Measurement - At the end of each day/week, the Sales Rep's total actual Projects and total Projects sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. 	
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3. 1-hour part three:

- a. Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- b. Technician Repair Call Check-in Opportunity Assessment Forms.
- c. Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. Subscription provided or purchase these documents:

Product ID 1011	<p>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job.</p> <p>Installed-Right Project Survey objectives are to help the Sales Rep:</p> <ul style="list-style-type: none"> To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. To provide the means to project a professional image. Systematically gather customer & technical info. To provide the means to demonstrate performance via your best practice project installation approach. To educate and move the customer from the lowest cost option to the BEST option. To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	\$99.95
Product ID 1012	<p>Technician Repair Call Check-in Opportunity Assessment Form In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form</p>	\$99.95
Product ID 1013	<p>Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled System Condition Report. This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to "harvest more opportunities" that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still "needs attention"</p>	\$99.95

	on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. 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.	
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4. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID 1018	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
Product ID 1019	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
1020	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project 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 after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1021	<i>Project/Design-Build Agreement Proposal Template</i> Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	<i>Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word</i> A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. 	\$99.95

	<ul style="list-style-type: none"> • Quantify your key achievements. • Show the prospect why you are an excellent match. 	
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#3 How to Win More Business by Differentiating Your Services

1. 1-hour part one:

- a. Review of purpose and how to create powerful service brand names.
- d. Example Design-Build Project Brand & Associated Value Positioning Statement.

e. Subscription provided or purchase these documents:

Product ID 1009	Contents of this course provided in MS Word You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM & Customized letter & line Card to better Position the company as an industry HVAC expert.	\$99.95
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#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part one:

- f. Sales Objections Always Fall into 1 of 5 Categories.
- g. The 4-Step Consultative Trust Selling Approach.
- h. Proactive Repair Trust-Selling Standard Procedures.
- i. Proactive Service Agreement Trust-Selling Standard Procedures.
- j. Types of Commercial Service Agreement Inspection & Repair Coverages.
- k. Service Agreement Maintenance Options.
- l. Pros & Cons by Service Agreement Type of Coverage.

m. Subscription provided or purchase these documents:

Product ID 1014	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 MS Word format to be printed on your local printer.	\$99.95
Product ID 1015	Proactive Service Agreement Sales Call Handling Tasking Procedures Service managers and commercial Sales Reps use this standard procedure document to perform the step-by-step functions of a professional service agreement call handling step-by-step procedure from a lead to sold agreement. This document is provided in original MS Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95

Product ID 1018	Service Agreement Sales First Call Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
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2. 1-hour part two:

- k. Proactive Service Agreement Trust-Selling Standard Procedures.
- l. Example: Commercial Service Agreement Long Form Maintenance Agreement.

m. Subscription provided or purchase these documents:

Product ID 1019	Commercial Service Agreement Short Form & Long Form Proposal Templates Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
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3. 1-hour part three:

- n. Proactive Project/Design-Build Trust-Selling Standards Procedures.
- o. Example: Design-Build/Project Cover letter and Proposal Agreement.
- p. Creating a Project/Design-Build Statement of Qualifications.
- q. Example: Cover Letter and Statement of Qualifications.

r. Subscription provided or purchase these documents:

Product ID 1020	Project/Design-Build Sales First Call Sales Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for project 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 after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
Product ID 1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
Product ID 1022	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements	\$99.95

	of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	
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#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part one:

- s. Advantages of Work Delivery Tasking Standards.
- t. Business Functions are the Labor Tasking Activities That Must Occur.
- u. Service Repair Work Delivery Tasking Standard Procedures.

v. **Subscription provided or purchase these documents:**

Product ID 1023	<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 MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part two:

- a. Service Agreement Work Delivery Tasking Standard Procedures.
- b. Example: Commercial Service Agreement Cover letter and Proposal Agreement.

c. **Subscription provided or purchase these documents:**

Product ID 1024	<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 MS Word format to be printed on your local printer.	\$159.95
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3. 1-hour part three:

- aa. Project/Design-Build Work Delivery Standards Procedures.

a. **Subscription provided or purchase these documents:**

Product ID 1025	<i>Project/Design-Build Work Delivery Standard Procedures</i> 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 MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part four:

- bb. Equipment Start-up and Maintenance Tasking Standards.

cc. Management Quality Assurance Standard Procedures.

dd. Accounts Receivable and Payable Standard Procedures.

ee. Subscription provided or purchase these documents:

Product ID 1026	Equipment Start-up & Maintenance Tasking Procedures 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 MS Word format to be printed on your local printer.	\$159.95
Product ID 1027	Accounts Receivable and Payable Standard Procedures Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. Subscription provided or purchase these documents:

Product ID 1030	Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set 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 part one:

- a. Five Business Processes That Positively Affect Employee Retention.
- b. Implementing Step-by-Step Work Delivery Standard Procedures.

c. **Subscription provided or purchase these documents:**

iv. N/A

2. **1-hour part two:**

- a. Implement Performance-Based Job Descriptions.
- b. Implementing Labor Billable Efficiency & Productivity Monitoring.

c. **Subscription provided or purchase these documents:**

Product ID 1032	Performance Incentive plan - Office, Technicians & Installer Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1033	Performance Incentive plan - Commercial Sales Rep Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1031	Complete Set Performance-Based Job Descriptions These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These documents are provided in MS Word format to be printed on your local printer. Set includes: <ul style="list-style-type: none"> ● Dispatcher Job Description ● Commercial Sales Rep 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 	\$99.95

3. **1-hour part three:**

- d. Implement Performance Incentive Plans.
 - e. Implementing a Company Culture of Success.
- f. **Subscription provided or purchase these documents:**

i. N/A

#8 How to Drive Profitability Using Key Performance Indicators

1. 1-hour:

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.
- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
- g. **Subscription provided or purchase these documents:**
 - i. N/A

#9 How to Efficiently Organize the Business for Growth

1. 1-hour:

- a. Why We Need to Organize Business into Groups.
- b. Commercial HVAC Business Organizational Structure.
- c. Five Logical Commercial Organizational Groups/Departments.
- d. Office Admin Department Functions & Organizational Structure.
- e. Sales Department Functions & Organizational Structure Service.
- f. Service Functions & Organizational Structure.
- g. Installation Department Functions & Organizational Structure.
- h. Construction Department Functions & Organizational Structure.
- i. **Subscription provided or purchase these documents:**

Product ID 1036	Commercial HVAC Service Contractor Organizational Charts Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company's book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all commercial HVAC companies should be organized in such a way as to compete competitively.	\$69.95
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#11 How to Forecast Your Monthly Spend Plan

1. **1-hour:**

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.

d. Subscription provided or purchase these documents:

Product ID 1039	BudgetPro Annual & Monthly Budgeting Calculator One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	\$159.95
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#12 How to Recruit and Retain Top Performers

1. **1-hour part one:**

- a. Proven Strategies to Help You Recruit the Best.
- b. Proven Strategies to Help You Retain the Best.
- c. Why Contractors are Making Bad Hiring Decisions.
- d. The Many Costs of Making a Bad Hire.
- e. Here are 9-Tips for Hiring the Right Candidate.
- f. Checklist for Hiring Employees.
- g. Checklist for Screening an Applicant Resume.

h. Subscription provided or purchase these documents:

- i. N/A

2. **1-hour part two:**

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.

e. Subscription provided or purchase these documents:

Product ID 1037	Employment Application 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 MS Word format to be printed on your local printer.	\$69.95
1038	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#13 How to Select and Implement Field Management Software

1. **1-hour:**

- a. Benefits of Field Service Management Software.
- b. Checklist for Selecting Field Service Management Software.
- c. **Subscription provided or purchase these documents:**
 - i. N/A

#14 How to Self-Develop Your Leadership and People Skills

2. **1-hour:**

- a. Different Leadership Styles and When to Use Them.
- b. The Top Leadership Skills to Improve.
- c. Implement Your Leadership Skill Self-Development Plan.
- d. **Subscription provided or purchase these documents:**
 - ii. N/A

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1. 1-hour part-one:

- a. How to implement a strategic business action plan
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- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

3. 1-hour part-one:

- a. Light-Commercial Upfront Repair Pricing Method.
- b. Time & Material Repair Pricing Method.
- c. **Subscription provided or purchase these documents:**

Product ID 1001	Done-Right Flat-Rate Price Guide You can order the Done-Right HVAC or Plumbing or as an Electrical repair guide. Select one repair guide for only \$39.95 per month, select two repair guides for only \$69.95 per month, or select all three guides for only \$79.95 per month, a 12-month subscription. Includes upload data for QuickBooks™ or for your field management software. Subscription consists of the following online training and resources: <ul style="list-style-type: none">• Technician Fix-Right Flat Rate USER Instructions.• Professional service call handling process.• Technician Service Call Handling Soft Skills for Proper Customer Communications.	\$39.95/M onth To \$79.95/M onth
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Product ID 1002	Technician/Installer Onsite Hourly Truck and Travel Costs & Pricing Calculator Program in MS Excel This document is used by service and replacement management to calculate the upfront per trip truck and travel rate for your upfront repair and replacement price guides. This document is provided in MS Excel format with results printed on your local printer.	\$69.95
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4. 1-hour part-two:

- a. Commercial HVAC Service Agreement Pricing Method.
- b. Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.
- c. Locking in Projected Repair Revenue Pricing Strategy Review.

d. Subscription provided or purchase these documents:

Product ID 1003	EasyPrice Service Agreement Sales Call Opportunity Assessment Form Mechanical rooms or central plant areas are logical starting points for multi-facility or multi-story facilities. Starting at the mechanical room or central plant gives the salesperson a better picture of how the conditioned air or water is distributed throughout the facility(s). Understanding how the HVAC/R system is distributed enables the salesperson to look for and ask pertinent questions related to system operating and maintenance tasking requirements.	\$99.95
1004	EasyPrice Service Agreement Estimating & Pricing Program MS Excel Service managers and commercial Sales Reps use this software to perform the step-by-step functions of a professional service agreement surveying, estimating, and pricing procedure. The benefit objective is to increase profitability by implementing a professional approach to accurately and efficiently gathering customer and scope of work job data, decreasing estimating human errors, reducing work-related risk liabilities, and by improving the customer's understanding how service agreement proposal development standardization increases efficiencies while reducing business risk to the company. Includes a complete set of 72-built-in equipment and filter estimating labor and material standards for packaged RTU, built-up systems, central plant heating/cooling, and associated equipment. This software tool is provided in original MS Excel format.	\$499.95

5. 1-hour part-three:

- a. Selecting Which Project Pricing Method to Use.
- b. Most Common - Single Divisor Project Pricing Method Review.
- c. EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement.
- d. Most Accurate – Project Dual Rate Overhead Project Pricing Method Review.
- e. Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.

f. Subscription provided or purchase these documents:

<p>Product ID</p> <p>1005</p>	<p><i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i></p> <p>This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep:</p> <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. <p>To provide the means to complete the sales call and close the transaction in 2 sales calls or less.</p>	<p>\$99.95</p>
<p>1006</p>	<p><i>EasyPrice Commercial/Industrial Project Single Divisor Pricing Calculator MS Excel</i></p> <p>When setting service pricing for your HVAC business, you need to understand that there are two types of business costs - direct and indirect or overhead costs. Direct costs are the cost of goods sold required to deliver work from a lead to job closeout. It includes parts, equipment, materials, ductwork, permits, labor, and vehicle expenses. Business owners typically price their work where most projects represent 60% or higher in equipment, materials, and subs. On the other hand, the indirect or overhead cost keeps the lights on and sustainable. Your overhead costs include your mortgage/lease/rent, utility expenses, admin and sales salary, uniforms, employee training, and trash removal. You need an accurate pricing method to compete on large or multi-phase jobs. The single divisor pricing method uses an average overhead recovery which can overprice a job.</p>	<p>\$99.95</p>
<p>1007</p>	<p><i>EasyPrice Dual Rate Overhead Project Pricing Calculator MS Excel</i></p> <p>This job pricing method utilizes two overhead rates for subcontractors, equipment, and materials and one for direct labor. The main reason to use this method is that overhead is more accurately distributed based on the percentage of install labor to non-labor and materials direct costs on a job. Overhead is allocated higher for projects with a large proportion of the job is installation labor versus equipment, materials, and subcontracts. Overheads are less where installation labor is small than non-labor and direct material costs.</p>	<p>\$99.95</p>

#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part three:

- a. Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- b. Technician Repair Call Check-in Opportunity Assessment Forms.
- c. Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.
- d. Subscription provided or purchase these documents:**

<p>Product ID</p> <p>1011</p>	<p>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</p> <p>This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep:</p> <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. • To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	<p>\$99.95</p>
<p>Product ID</p> <p>1012</p>	<p>Technician Repair Call Check-in Opportunity Assessment Form</p> <p>In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form</p>	<p>\$99.95</p>
<p>Product ID</p> <p>1013</p>	<p>Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled System Condition Report. This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. 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.</p>	<p>\$99.95</p>

2. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID 1018	Service Agreement Sales First Call Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
1019	Commercial Service Agreement Short Form & Long Form Proposal Templates Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
1020	Project/Design-Build Sales First Call Sales Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for project 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 after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
Product ID 1022	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part one:

- a. Sales Objections Always Fall into 1 of 5 Categories.
- b. The 4-Step Consultative Trust Selling Approach.
- c. Proactive Repair Trust-Selling Standard Procedures.
- d. Proactive Service Agreement Trust-Selling Standard Procedures.
- e. Types of Commercial Service Agreement Inspection & Repair Coverages.
- f. Service Agreement Maintenance Options.
- g. Pros & Cons by Service Agreement Type of Coverage.

h. Subscription provided or purchase these documents:

Product ID 1014	<i>Proactive Repair Call Handling Tasking Procedures</i> 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 MS Word format to be printed on your local printer.	\$99.95
Product ID 1015	<i>Proactive Service Agreement Sales Call Handling Tasking Procedures</i> Service managers and commercial Sales Reps use this standard procedure document to perform the step-by-step functions of a professional service agreement call handling step-by-step procedure from a lead to sold agreement. This document is provided in original MS Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95
Product ID 1018	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95

2. 1-hour part two:

- a. Proactive Service Agreement Trust-Selling Standard Procedures.
- b. Example: Commercial Service Agreement Long Form Maintenance Agreement.

c. Subscription provided or purchase these documents:

Product ID 1019	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
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#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part one:

- a. Advantages of Work Delivery Tasking Standards.
- b. Business Functions are the Labor Tasking Activities That Must Occur.
- c. Service Repair Work Delivery Tasking Standard Procedures.

d. Subscription provided or purchase these documents:

Product ID 1023	<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 MS Word format to be printed on your local printer.	\$159.95
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3. 1-hour part two:

- a. Service Agreement Work Delivery Tasking Standard Procedures.
- b. Example: Commercial Service Agreement Cover letter and Proposal Agreement.

c. Subscription provided or purchase these documents:

Product ID 1024	<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 MS Word format to be printed on your local printer.	\$159.95
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4. 1-hour part three:

- ff. Project/Design-Build Work Delivery Standards Procedures.

a. Subscription provided or purchase these documents:

Product ID 1025	<i>Project/Design-Build Work Delivery Standard Procedures</i> 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 MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part four:

- gg. Equipment Start-up and Maintenance Tasking Standards.
- hh. Management Quality Assurance Standard Procedures.
- ii. Accounts Receivable and Payable Standard Procedures.

jj. Subscription provided or purchase these documents:

Product ID 1026	<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 MS Word format to be printed on your local printer.	\$159.95
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1027	<i>Accounts Receivable and Payable Standard Procedures</i> Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95
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3. 1-hour part five:

- kk. Inventory & Tool Control Standards Procedures.
- ll. Customer Care Call Handling Standard Procedures.
- mm. Customer Billing Standards.

nn. Subscription provided or purchase these documents:

Product ID 1028	<i>Inventory and Tool Control Standards</i> Includes step-by-step company job and truck inventory control standards. General managers, service managers, and operations managers use them. This document is provided in original MS Word format to be printed on your local printer..	\$99.95
1029	<i>Effective Customer Care Call Handling Standard Procedures</i> Arming the dispatcher with a professional standardized way to greet and respond to customer inquiries to include: <ul style="list-style-type: none"> • Greeting the Customer • Identify How Customer Will Pay for Today's Work • Informing the Customer of Response Time: • Identifying the Lead Source • Reminding the Customer of What Happens Next • Calling the Customer to Confirm Arrival Time • Calling to Reschedule Appointment • If a Solution Requires a Plan • Callback With a Plan 	\$99.95

4. 1-hour part six:

- a. Field Labor Productivity Optimization Standards.
- b. Service Reporting Standard Procedures.
- c. **Subscription provided or purchase these documents:**
 - i. N/A

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.

- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.
- e. Subscription provided or purchase these documents:**

Product ID	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i> 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
1030		

#7 How to Retain the Best People with Proven Employee Retention Strategies

1. 1-hour part one:

- a. Five Business Processes That Positively Affect Employee Retention.
- b. Implementing Step-by-Step Work Delivery Standard Procedures.
- c. **Subscription provided or purchase these documents:**
 - v. N/A

2. 1-hour part two:

- a. Implement Performance-Based Job Descriptions.
- b. Implementing Labor Billable Efficiency & Productivity Monitoring.
- c. **Subscription provided or purchase these documents:**

Product ID	<i>Performance Incentive plan - Office, Technicians & Installer</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1032		
1033	<i>Performance Incentive plan - Commercial Sales Rep</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

<p>Product ID</p> <p>1031</p>	<p>Complete Set Performance-Based Job Descriptions</p> <p>These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These documents are provided in MS Word format to be printed on your local printer. Set includes:</p> <ul style="list-style-type: none"> ● Dispatcher Job Description ● Commercial Sales Rep 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>
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3. 1-hour part three:

- d. Implement Performance Incentive Plans.
- e. Implementing a Company Culture of Success.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#8 How to Drive Profitability Using Key Performance Indicators

1. 1-hour:

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.
- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
- g. **Subscription provided or purchase these documents:**
 - i. N/A

#9 How to Efficiently Organize the Business for Growth

1. 1-hour:

- a. Why We Need to Organize Business into Groups.
- b. Commercial HVAC Business Organizational Structure.
- c. Five Logical Commercial Organizational Groups/Departments.
- d. Office Admin Department Functions & Organizational Structure.
- e. Sales Department Functions & Organizational Structure Service.
- f. Service Functions & Organizational Structure.
- g. Installation Department Functions & Organizational Structure.
- h. Construction Department Functions & Organizational Structure.
- i. Subscription provided or purchase these documents:**

<p>Product ID</p> <p>1036</p>	<p><i>Commercial HVAC Service Contractor Organizational Charts</i></p> <p>Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company's book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all commercial HVAC companies should be organized in such a way as to compete competitively.</p>	<p>\$69.95</p>
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#10 How to Implement Proper Customer Care Call Handling Procedures

1. 1-hour:

- a. Importance of Good Customer Care.
- b. Customer Care Inbound and Outbound Call Handling Script.
- c. Crucial Hiring Criteria for the Customer Care & Dispatcher Function.
- d. Organizing an Office Central Filing System.
- e. Implement Hiring Guidelines for the Customer Care/Dispatch Function.
- f. Customer Service 101: Proper Phone Etiquette.
- g. Implement Training for the Customer Care/Dispatch Function.
- h. Subscription provided or purchase these documents:**

Product ID 1034	Customer Care Call Handling Inbound and Outbound Script This script includes a professional standardized way to greet and responds to the customer inquiries. The script includes greeting the customer, identifying if they are interested in a service agreement, annual service agreement renewal reminder, identifying how the customer they pay for today's work, informing the customer of response time, identifying the lead source, calling the customer to confirm arrival time, managing the price of today's service, calling to reschedule an appointment, handling upset callers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
Product ID 1035	Customer Care Response for "Price is Too High" Objection Used by customer care, receptionist, and dispatchers. This document is designed to inform employees and your customers why we price our services, justifying the price to the customer post service. Includes a professional standardized way to respond to a price objection via letter or email. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#11 How to Forecast Your Monthly Spend Plan

1. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.

d. Subscription provided or purchase these documents:

Product ID 1039	BudgetPro Annual & Monthly Budgeting Calculator One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	\$159.95
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#12 How to Recruit and Retain Top Performers

1. 1-hour part one:

- a. Proven Strategies to Help You Recruit the Best.
- b. Proven Strategies to Help You Retain the Best.
- c. Why Contractors are Making Bad Hiring Decisions.
- d. The Many Costs of Making a Bad Hire.

- e. Here are 9-Tips for Hiring the Right Candidate.
- f. Checklist for Hiring Employees.
- g. Checklist for Screening an Applicant Resume.
- h. Subscription provided or purchase these documents:**
 - i. N/A**

2. 1-hour part two:

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.
- e. Subscription provided or purchase these documents:**

Product ID 1037	Employment Application 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 MS Word format to be printed on your local printer.	\$69.95
1038	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#13 How to Select and Implement Field Management Software

2. 1-hour:

- a. Benefits of Field Service Management Software.
- b. Checklist for Selecting Field Service Management Software.
- c. Subscription provided or purchase these documents:**
 - i. N/A**

#14 How to Self-Develop Your Leadership and People Skills

3. 1-hour:

- a. Different Leadership Styles and When to Use Them.
- b. The Top Leadership Skills to Improve.

- c. Implement Your Leadership Skill Self-Development Plan.
- d. **Subscription provided or purchase these documents:**
 - ii. N/A

Dispatcher/Customer Care Manager Job Training Track

NOTE: To order documents, go to www.WendellBedell.com.

Pilot - How to Master a Thriving Commercial HVAC Service Business

2. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

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

1. 1-hour part one:

- e. Advantages of Work Delivery Tasking Standards.
- f. Business Functions are the Labor Tasking Activities That Must Occur.
- g. Service Repair Work Delivery Tasking Standard Procedures.
- h. **Subscription provided or purchase these documents:**

Product ID 1023	Service Repair Work Delivery Standard Procedures 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 MS 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. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. Subscription provided or purchase these documents:

Product ID 1030	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i> 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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#10 How to Implement Proper Customer Care Call Handling Procedures

1. 1-hour:

- a. Importance of Good Customer Care
- b. Customer Care Inbound and Outbound Call Handling Script
- c. Crucial Hiring Criteria for the Customer Care & Dispatcher Function
- d. Implement Training for the Customer Care/Dispatch Function

e. Subscription provided or purchase these documents:

Installation/Construction Manager Job Training Track

NOTE: To order documents, go to www.WendellBedell.com.

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-three:

- a. Selecting Which Project Pricing Method to Use.
- b. Most Common - Single Divisor Project Pricing Method Review.
- c. EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement.
- d. Most Accurate – Project Dual Rate Overhead Project Pricing Method Review.
- e. Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.
- f. **Subscription provided or purchase these documents:**

Product ID	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep:	\$99.95
1005	<ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. <p>To provide the means to complete the sales call and close the transaction in 2</p>	

	sales calls or less.	
Product ID 1006	<p>EasyPrice Commercial/Industrial Project Single Divisor Pricing Calculator MS Excel</p> <p>When setting service pricing for your HVAC business, you need to understand that there are two types of business costs - direct and indirect or overhead costs. Direct costs are the cost of goods sold required to deliver work from a lead to job closeout. It includes parts, equipment, materials, ductwork, permits, labor, and vehicle expenses. Business owners typically price their work where most projects represent 60% or higher in equipment, materials, and subs. On the other hand, the indirect or overhead cost keeps the lights on and sustainable. Your overhead costs include your mortgage/lease/rent, utility expenses, admin and sales salary, uniforms, employee training, and trash removal. You need an accurate pricing method to compete on large or multi-phase jobs. The single divisor pricing method uses an average overhead recovery which can overprice a job.</p>	\$99.95
1007	<p>EasyPrice Dual Rate Overhead Project Pricing Calculator MS Excel</p> <p>This job pricing method utilizes two overhead rates for subcontractors, equipment, and materials and one for direct labor. The main reason to use this method is that overhead is more accurately distributed based on the percentage of install labor to non-labor and materials direct costs on a job. Overhead is allocated higher for projects with a large proportion of the job is installation labor versus equipment, materials, and subcontracts. Overheads are less where installation labor is small than non-labor and direct material costs.</p>	\$99.95

#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part three:

- a. Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- b. Technician Repair Call Check-in Opportunity Assessment Forms.
- c. Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. **Subscription provided or purchase these documents:**

<p>Product ID</p> <p>1011</p>	<p>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</p> <p>This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep:</p> <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. • To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	<p>\$99.95</p>
<p>Product ID</p> <p>1012</p>	<p>Technician Repair Call Check-in Opportunity Assessment Form</p> <p>In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form</p>	<p>\$99.95</p>
<p>Product ID</p> <p>1013</p>	<p>Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled System Condition Report. This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. 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.</p>	<p>\$99.95</p>

2. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.
- c. Subscription provided or purchase these documents:**

Product ID 1018	<i>Service Agreement Sales First Call Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
1019	<i>Commercial Service Agreement Short Form & Long Form Proposal Templates</i> Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
1020	<i>Project/Design-Build Sales First Call Sales Handout Presentation</i> This promotional tool is used by Commercial Sales Reps on a request for project 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 after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1021	<i>Project/Design-Build Agreement Proposal Template</i> Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	<i>Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word</i> A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part three:

- a. Proactive Project/Design-Build Trust-Selling Standards Procedures.
- b. Example: Design-Build/Project Cover letter and Proposal Agreement.
- c. Creating a Project/Design-Build Statement of Qualifications.
- d. Example: Cover Letter and Statement of Qualifications.

e. Subscription provided or purchase these documents:

Product ID 1020	Project/Design-Build Sales First Call Sales Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for project 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 after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
Product ID 1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

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

1. 1-hour part one:

- f. Advantages of Work Delivery Tasking Standards.
- g. Business Functions are the Labor Tasking Activities That Must Occur.
- h. Service Repair Work Delivery Tasking Standard Procedures.
- i. **Subscription provided or purchase these documents:**

Product ID 1023	Service Repair Work Delivery Standard Procedures 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 MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part four:

- d. Equipment Start-up and Maintenance Tasking Standards.
- e. Management Quality Assurance Standard Procedures.
- f. Accounts Receivable and Payable Standard Procedures.
- g. **Subscription provided or purchase these documents:**

Product ID	Equipment Start-up & Maintenance Tasking Procedures These documents are used by service managers, installation managers,	
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1026	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 MS Word format to be printed on your local printer.	\$159.95
1027	<i>Accounts Receivable and Payable Standard Procedures</i> Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

3. 1-hour part five:

- h. Inventory & Tool Control Standards Procedures.
- i. Customer Care Call Handling Standard Procedures.
- j. Customer Billing Standards.

k. Subscription provided or purchase these documents:

Product ID 1028	<i>Inventory and Tool Control Standards</i> Includes step-by-step company job and truck inventory control standards. General managers, service managers, and operations managers use them. This document is provided in original MS Word format to be printed on your local printer..	\$99.95
Product ID 1029	<i>Effective Customer Care Call Handling Standard Procedures</i> Arming the dispatcher with a professional standardized way to greet and respond to customer inquiries to include: <ul style="list-style-type: none"> • Greeting the Customer • Identify How Customer Will Pay for Today's Work • Informing the Customer of Response Time: • Identifying the Lead Source • Reminding the Customer of What Happens Next • Calling the Customer to Confirm Arrival Time • Calling to Reschedule Appointment • If a Solution Requires a Plan • Callback With a Plan 	\$99.95

4. 1-hour part six:

- l. Field Labor Productivity Optimization Standards.
- m. Service Reporting Standard Procedures.
- n. **Subscription provided or purchase these documents:**
 - i. N/A

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. Subscription provided or purchase these documents:

Product ID	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i> 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
1030		

#7 How to Retain the Best People with Proven Employee Retention Strategies

1. 1-hour part one:

- a. Five Business Processes That Positively Affect Employee Retention.
- b. Implementing Step-by-Step Work Delivery Standard Procedures.
- c. **Subscription provided or purchase these documents:**

vi. N/A

2. 1-hour part two:

- a. Implement Performance-Based Job Descriptions.
- b. Implementing Labor Billable Efficiency & Productivity Monitoring.
- c. **Subscription provided or purchase these documents:**

Product ID	<i>Performance Incentive plan - Office, Technicians & Installer</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1032		
1033	<i>Performance Incentive plan - Commercial Sales Rep</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

<p>Product ID</p> <p>1031</p>	<p>Complete Set Performance-Based Job Descriptions</p> <p>These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These documents are provided in MS Word format to be printed on your local printer. Set includes:</p> <ul style="list-style-type: none"> ● Dispatcher Job Description ● Commercial Sales Rep 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>
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3. 1-hour part three:

- d. Implement Performance Incentive Plans.
- e. Implementing a Company Culture of Success.

f. Subscription provided or purchase these documents:

- i. N/A

#8 How to Drive Profitability Using Key Performance Indicators

1. 1-hour:

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.
- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.

g. Subscription provided or purchase these documents:

- i. N/A

9 How to Efficiently Organize the Business for Growth

1. 1-hour:

- a. Why We Need to Organize Business into Groups.
- b. Commercial HVAC Business Organizational Structure.
- c. Five Logical Commercial Organizational Groups/Departments.
- d. Office Admin Department Functions & Organizational Structure.
- e. Sales Department Functions & Organizational Structure Service.
- f. Service Functions & Organizational Structure.
- g. Installation Department Functions & Organizational Structure.
- h. Construction Department Functions & Organizational Structure.
- i. Subscription provided or purchase these documents:**

Product ID 1036	<p><i>Commercial HVAC Service Contractor Organizational Charts</i></p> <p>Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company's book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all commercial HVAC companies should be organized in such a way as to compete competitively.</p>	\$69.95
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#11 How to Forecast Your Monthly Spend Plan

1. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.
- d. Subscription provided or purchase these documents:**

Product ID 1039	<p><i>BudgetPro Annual & Monthly Budgeting Calculator</i></p> <p>One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately</p>	\$159.95
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	and in a tenth of the time. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in MS Excel format.	
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#12 How to Recruit and Retain Top Performers

1. 1-hour part one:

- a. Proven Strategies to Help You Recruit the Best.
- b. Proven Strategies to Help You Retain the Best.
- c. Why Contractors are Making Bad Hiring Decisions.
- d. The Many Costs of Making a Bad Hire.
- e. Here are 9-Tips for Hiring the Right Candidate.
- f. Checklist for Hiring Employees.
- g. Checklist for Screening an Applicant Resume.
- h. Subscription provided or purchase these documents:**
 - i. N/A

2. 1-hour part two:

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.
- e. Subscription provided or purchase these documents:**

Product ID 1037	Employment Application 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 MS Word format to be printed on your local printer.	\$69.95
1038	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#13 How to Select and Implement Field Management Software

1. 1-hour:

- a. Benefits of Field Service Management Software.

- b. Checklist for Selecting Field Service Management Software.
- c. **Subscription provided or purchase these documents:**
 - i. N/A

#14 How to Self-Develop Your Leadership and People Skills

- 1. **1-hour:**
 - a. Different Leadership Styles and When to Use Them.
 - b. The Top Leadership Skills to Improve.
 - c. Implement Your Leadership Skill Self-Development Plan.
 - d. **Subscription provided or purchase these documents:**
 - ii. N/A

Project/Design-Build Estimator

NOTE: To order documents, go to www.WendellBedell.com.

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-three:

- a. Selecting Which Project Pricing Method to Use.
- b. Most Common - Single Divisor Project Pricing Method Review.
- c. EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement.
- d. Most Accurate – Project Dual Rate Overhead Project Pricing Method Review.
- e. Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.
- f. **Subscription provided or purchase these documents:**

Product ID	<p><i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep:</p>	
1005	<ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. 	\$99.95

	To provide the means to complete the sales call and close the transaction in 2 sales calls or less.	
Product ID 1006	<i>EasyPrice Commercial/Industrial Project Single Divisor Pricing Calculator MS Excel</i> When setting service pricing for your HVAC business, you need to understand that there are two types of business costs - direct and indirect or overhead costs. Direct costs are the cost of goods sold required to deliver work from a lead to job closeout. It includes parts, equipment, materials, ductwork, permits, labor, and vehicle expenses. Business owners typically price their work where most projects represent 60% or higher in equipment, materials, and subs. On the other hand, the indirect or overhead cost keeps the lights on and sustainable. Your overhead costs include your mortgage/lease/rent, utility expenses, admin and sales salary, uniforms, employee training, and trash removal. You need an accurate pricing method to compete on large or multi-phase jobs. The single divisor pricing method uses an average overhead recovery which can overprice a job.	\$99.95
1007	<i>EasyPrice Dual Rate Overhead Project Pricing Calculator MS Excel</i> This job pricing method utilizes two overhead rates for subcontractors, equipment, and materials and one for direct labor. The main reason to use this method is that overhead is more accurately distributed based on the percentage of install labor to non-labor and materials direct costs on a job. Overhead is allocated higher for projects with a large proportion of the job is installation labor versus equipment, materials, and subcontracts. Overheads are less where installation labor is small than non-labor and direct material costs.	\$99.95

#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part three:

- a. Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- b. Technician Repair Call Check-in Opportunity Assessment Forms.
- c. Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. Subscription provided or purchase these documents:

Product ID 1011	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep: <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. • To provide the means to close the transaction in 2 sales calls or less. 	\$99.95
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Product ID 1012	Technician Repair Call Check-in Opportunity Assessment Form In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form	\$99.95
1013	Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled System Condition Report . This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. 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.	\$99.95

2. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID 1018	Service Agreement Sales First Call Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
1019	Commercial Service Agreement Short Form & Long Form Proposal Templates Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95

Product ID 1020	Project/Design-Build Sales Frist Call Sales Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for project 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 after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

2. 1-hour part three:

- a. Proactive Project/Design-Build Trust-Selling Standards Procedures.
- b. Example: Design-Build/Project Cover letter and Proposal Agreement.
- c. Creating a Project/Design-Build Statement of Qualifications.
- d. Example: Cover Letter and Statement of Qualifications.

e. Subscription provided or purchase these documents:

Product ID 1020	Project/Design-Build Sales Frist Call Sales Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for project 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 after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
Product ID 1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95

Product ID	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word	
1022	<p>A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include:</p> <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

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

1. 1-hour part four:

- o. Equipment Start-up and Maintenance Tasking Standards.
- p. Management Quality Assurance Standard Procedures.
- q. Accounts Receivable and Payable Standard Procedures.

r. **Subscription provided or purchase these documents:**

Product ID	Equipment Start-up & Maintenance Tasking Procedures	
1026	<p>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 MS Word format to be printed on your local printer.</p>	\$159.95
1027	Accounts Receivable and Payable Standard Procedures	
	<p>Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.</p>	\$99.95

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. Subscription provided or purchase these documents:

Product ID 1030	<i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i> 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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Commercial Service Agreement Sales Rep Job Training Track

NOTE: To order documents, go to www.WendellBedell.com.

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-two:

- a. Commercial HVAC Service Agreement Pricing Method.
- b. Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.
- c. Locking in Projected Repair Revenue Pricing Strategy Review.
- d. **Subscription provided or purchase these documents:**

Product ID 1003	<i>EasyPrice Service Agreement Sales Call Opportunity Assessment Form</i> Mechanical rooms or central plant areas are logical starting points for multi-facility or multi-story facilities. Starting at the mechanical room or central plant gives the salesperson a better picture of how the conditioned air or water is distributed throughout the facility(s). Understanding how the HVAC/R system is distributed enables the salesperson to look for and ask pertinent questions related to system operating and maintenance tasking requirements.	\$99.95
1004	<i>EasyPrice Service Agreement Estimating & Pricing Program MS Excel</i> Service managers and commercial Sales Reps use this software to perform the step-by-step functions of a professional service agreement surveying, estimating, and pricing procedure. The benefit objective is to increase profitability by implementing a professional approach to accurately and efficiently gathering customer and scope of work job data, decreasing estimating human errors, reducing work-related risk liabilities, and by improving the customer's understanding how service agreement proposal development standardization increases efficiencies while reducing business risk to the company. Includes a complete set of 72-built-in equipment and filter estimating labor and material standards for packaged RTU, built-up systems, central plant heating/cooling, and associated equipment. This software tool is provided in original MS Excel format.	\$499.95

2. 1-hour part-three:

- a. Selecting Which Project Pricing Method to Use.
- b. Most Common - Single Divisor Project Pricing Method Review.
- c. EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement.
- d. Most Accurate – Project Dual Rate Overhead Project Pricing Method Review.
- e. Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.

f. Subscription provided or purchase these documents:

<p>Product ID</p> <p>1005</p>	<p><i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep:</p> <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. <p>To provide the means to complete the sales call and close the transaction in 2 sales calls or less.</p>	<p>\$99.95</p>
<p>1006</p>	<p><i>EasyPrice Commercial/Industrial Project Single Divisor Pricing Calculator MS Excel</i> When setting service pricing for your HVAC business, you need to understand that there are two types of business costs - direct and indirect or overhead costs. Direct costs are the cost of goods sold required to deliver work from a lead to job closeout. It includes parts, equipment, materials, ductwork, permits, labor, and vehicle expenses. Business owners typically price their work where most projects represent 60% or higher in equipment, materials, and subs. On the other hand, the indirect or overhead cost keeps the lights on and sustainable. Your overhead costs include your mortgage/lease/rent, utility expenses, admin and sales salary, uniforms, employee training, and trash removal. You need an accurate pricing method to compete on large or multi-phase jobs. The single divisor pricing method uses an average overhead recovery which can overprice a job.</p>	<p>\$99.95</p>
<p>Product ID</p> <p>1007</p>	<p><i>EasyPrice Dual Rate Overhead Project Pricing Calculator MS Excel</i> This job pricing method utilizes two overhead rates for subcontractors, equipment, and materials and one for direct labor. The main reason to use this method is that overhead is more accurately distributed based on the percentage of install labor to non-labor and materials direct costs on a job. Overhead is allocated higher for projects with a large proportion of the job is</p>	<p>\$99.95</p>

	installation labor versus equipment, materials, and subcontracts. Overheads are less where installation labor is small than non-labor and direct material costs.	
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#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part one:

- a. Segmenting Commercial HVAC Markets is More Effective than Generic Marketing.
- b. Medium and Large Government Building Buyer Profile & Sales Positioning.
- c. Commercial Building Buyer Profile & Sales Positioning.
- d. Industrial Building Buyer Profile & Sales Positioning.
- e. College/University Building Buyer Profile & Sales Positioning.
- f. Healthcare Building Buyer Profile & Sales Positioning.
- g. Understanding Building Owner/Operator Roles & Responsibilities.
- h. **Subscription provided or purchase these documents:**

Product ID 2007	<p>Receive the industry Profiles and Understanding Building Owner/Operator Roles & Responsibilities profiles in MS Word</p> <p>This document provides you with all industry profiles as well as the buyer job responsibilities and duties profile as shown in course and enables you to add other industries or update the provided industry and client buyer job description profiles.</p>	\$99.95
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2. 1-hour part two:

- a. An Effective Step-by-Step Commercial Lead Generation Strategy and Tactical Plan.
- b. Overcome Common Commercial HVAC Sales Objections.
- c. The 10 Commandments of Time Management.
- d. Organization Option for Implementing Commercial Lead Generation.
- e. **Subscription provided or purchase these documents:**

Product ID 1008	<p>Commercial HVAC Contractor Introduction Letter & Line Card Templates</p> <p>You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM & Customized letter & line Card to better Position the company as an industry HVAC expert.</p>	\$99.95
Product ID 1009	<p>Commercial Lead Generation Outbound Sales Call Script</p> <p>Lead generation is about building your customer base by retaining and adding new customers. Lead generation is an essential business process to consistently acquire new commercial business through the design, production, and direct marketing tasking efforts within your sales area. Marketing is the same thing as lead generation, which is the process of systematic customer awareness communications. The process involves using a 12-step lead generation implementation plan:</p>	\$99.95

	<p>49. Identify capabilities as derived by you and your staff's experience and expertise.</p> <p>50. Identify packages of offerings based on your staff capabilities.</p> <p>51. Identify target markets that fit your capabilities.</p> <p>52. Obtain a target commercial business list of owner-occupied industries.</p> <p>53. Import into a contact management program (e.g., Outlook).</p> <p>54. Set specific weekly goals for the number of prospects contacted, called, mailed & follow-up.</p> <p>55. Set specific weekly new business appointments.</p> <p>56. Clean target group list with decision makers names.</p> <p>57. Mail introduction letter and line card.</p> <p>58. Follow-up to identify client scope of work and develop proposals.</p> <p>59. Set an appointment to present and close the business.</p> <p>60. Reporting lead generation performance to a business development plan.</p>	
<p>Product ID</p> <p>1010</p>	<p>Performance Tasking & Quota Tracking & Reporting in MS Excel</p> <p>To report Actual Sales Tasking Plan to Quota Performance for:</p> <ul style="list-style-type: none"> • Sales Tasking Quotas - It is the Sales Manager identifies that sets Sales Rep tasking plan quotas for service agreements and jobs by individual Sales Reps. • Demand Service Performance Measurement - At the end of each day/week, the Sales Rep's total actual new account Demand Service and total sold to date are tracked by Service Manager and reported to the Sales Rep and the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Service Agreement Performance Measurement - At the end of each day/week, the Sales Rep's total actual Service Agreements and total Service Agreements sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Project Performance Measurement - At the end of each day/week, the Sales Rep's total actual Projects and total Projects sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. 	<p>\$99.95</p>

3. 1-hour part three:

- a. Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- b. Technician Repair Call Check-in Opportunity Assessment Forms.
- c. Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. Subscription provided or purchase these documents:

<p>Product ID</p>	<p>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</p> <p>This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right</p>	
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1011	<p>Project Survey objectives are to help the Sales Rep:</p> <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. • To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	\$99.95
Product ID 1012	<p>Technician Repair Call Check-in Opportunity Assessment Form</p> <p>In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form</p>	\$99.95
Product ID 1013	<p>Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms</p> <p>Entitled System Condition Report. This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. 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.</p>	\$99.95

4. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID 1018	Service Agreement Sales First Call Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
1019	Commercial Service Agreement Short Form & Long Form Proposal Templates Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
1020	Project/Design-Build Sales First Call Sales Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for project 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 after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part one:

- d. Sales Objections Always Fall into 1 of 5 Categories.
- e. The 4-Step Consultative Trust Selling Approach.
- f. Proactive Repair Trust-Selling Standard Procedures.
- g. Proactive Service Agreement Trust-Selling Standard Procedures.
- h. Types of Commercial Service Agreement Inspection & Repair Coverages.
- i. Service Agreement Maintenance Options.
- j. Pros & Cons by Service Agreement Type of Coverage.

k. Subscription provided or purchase these documents:

Product ID 1014	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 MS Word format to be printed on your local printer.	\$99.95
Product ID 1015	Proactive Service Agreement Sales Call Handling Tasking Procedures Service managers and commercial Sales Reps use this standard procedure document to perform the step-by-step functions of a professional service agreement call handling step-by-step procedure from a lead to sold agreement. This document is provided in original MS Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95
Product ID 1018	Service Agreement Sales First Call Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95

2. 1-hour part two:

- a. Proactive Service Agreement Trust-Selling Standard Procedures.
- b. Example: Commercial Service Agreement Long Form Maintenance Agreement.

c. Subscription provided or purchase these documents:

Product ID 1019	Commercial Service Agreement Short Form & Long Form Proposal Templates Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
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#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part two:

- a. Service Agreement Work Delivery Tasking Standard Procedures.
- b. Example: Commercial Service Agreement Cover letter and Proposal Agreement.

c. Subscription provided or purchase these documents:

Product ID 1024	Service Agreement Work Delivery Standard Procedures 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 MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part four:

- s. Equipment Start-up and Maintenance Tasking Standards.
- t. Management Quality Assurance Standard Procedures.
- u. Accounts Receivable and Payable Standard Procedures.

v. Subscription provided or purchase these documents:

Product ID	Equipment Start-up & Maintenance Tasking Procedures 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 MS Word format to be printed on your local printer.	\$159.95
1026		
1027	Accounts Receivable and Payable Standard Procedures Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. Subscription provided or purchase these documents:

Product ID	Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set 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
1030		

Commercial Project/Design-Build Sales Rep Job Training Track

NOTE: To order documents, go to www.WendellBedell.com.

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-two:

- a. Commercial HVAC Service Agreement Pricing Method.
- b. Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.
- c. Locking in Projected Repair Revenue Pricing Strategy Review.
- d. **Subscription provided or purchase these documents:**

Product ID 1003	EasyPrice Service Agreement Sales Call Opportunity Assessment Form Mechanical rooms or central plant areas are logical starting points for multi-facility or multi-story facilities. Starting at the mechanical room or central plant gives the salesperson a better picture of how the conditioned air or water is distributed throughout the facility(s). Understanding how the HVAC/R system is distributed enables the salesperson to look for and ask pertinent questions related to system operating and maintenance tasking requirements.	\$99.95
Product ID 1004	EasyPrice Service Agreement Estimating & Pricing Program MS Excel Service managers and commercial Sales Reps use this software to perform the step-by-step functions of a professional service agreement surveying, estimating, and pricing procedure. The benefit objective is to increase profitability by implementing a professional approach to accurately and efficiently gathering customer and scope of work job data, decreasing estimating human errors, reducing work-related risk liabilities, and by improving the customer's understanding how service agreement proposal development standardization	\$499.95

	increases efficiencies while reducing business risk to the company. Includes a complete set of 72-built-in equipment and filter estimating labor and material standards for packaged RTU, built-up systems, central plant heating/cooling, and associated equipment. This software tool is provided in original MS Excel format.	
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2. 1-hour part-three:

- a. Selecting Which Project Pricing Method to Use.
- b. Most Common - Single Divisor Project Pricing Method Review.
- c. EXAMPLE: Single Divisor Pricing - 10-Ton Packaged Rooftop Replacement.
- d. Most Accurate – Project Dual Rate Overhead Project Pricing Method Review.
- e. Comparing the Single Divisor to the Dual Rate Overhead Pricing Method.

f. Subscription provided or purchase these documents:

Product ID	<i>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</i> This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep:	\$99.95
1005	<ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. <p>To provide the means to complete the sales call and close the transaction in 2 sales calls or less.</p>	
Product ID	<i>EasyPrice Commercial/Industrial Project Single Divisor Pricing Calculator MS Excel</i> When setting service pricing for your HVAC business, you need to understand that there are two types of business costs - direct and indirect or overhead costs. Direct costs are the cost of goods sold required to deliver work from a lead to job closeout. It includes parts, equipment, materials, ductwork, permits, labor, and vehicle expenses. Business owners typically price their work where most projects represent 60% or higher in equipment, materials, and subs. On the other hand, the indirect or overhead cost keeps the lights on and sustainable. Your overhead costs include your mortgage/lease/rent, utility expenses, admin and sales salary, uniforms, employee training, and trash removal. You need an accurate pricing method to compete on large or multi-phase jobs. The single divisor pricing method uses an average overhead recovery which can overprice a job.	\$99.95
1006		

Product ID	EasyPrice Dual Rate Overhead Project Pricing Calculator MS Excel	
	This job pricing method utilizes two overhead rates for subcontractors, equipment, and materials and one for direct labor. The main reason to use this method is that overhead is more accurately distributed based on the percentage of install labor to non-labor and materials direct costs on a job.	
1007	Overhead is allocated higher for projects with a large proportion of the job is installation labor versus equipment, materials, and subcontracts. Overheads are less where installation labor is small than non-labor and direct material costs.	\$99.95

#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part one:

- a. Segmenting Commercial HVAC Markets is More Effective than Generic Marketing.
- b. Medium and Large Government Building Buyer Profile & Sales Positioning.
- c. Commercial Building Buyer Profile & Sales Positioning.
- d. Industrial Building Buyer Profile & Sales Positioning.
- e. College/University Building Buyer Profile & Sales Positioning.
- f. Healthcare Building Buyer Profile & Sales Positioning.
- g. Understanding Building Owner/Operator Roles & Responsibilities.
- h. **Subscription provided or purchase these documents:**

Product ID	Receive the industry Profiles and Understanding Building Owner/Operator Roles & Responsibilities profiles in MS Word	
2007	This document provides you with all industry profiles as well as the buyer job responsibilities and duties profile as shown in course and enables you to add other industries or update the provided industry and client buyer job description profiles.	\$99.95

2. 1-hour part two:

- a. An Effective Step-by-Step Commercial Lead Generation Strategy and Tactical Plan.
- b. Overcome Common Commercial HVAC Sales Objections.
- c. The 10 Commandments of Time Management.
- d. Organization Option for Implementing Commercial Lead Generation.
- e. **Subscription provided or purchase these documents:**

Product ID	Commercial HVAC Contractor Introduction Letter & Line Card Templates	
1008	You lead with the offer to provide them with a competitive price for their outsourced mechanical maintenance services. You make them aware of your other replacement, retrofit and design-build capabilities. You provide them with your MECHANICAL SAFE-GUARD MAINTENANCE PROGRAM & Customized letter & line Card to better Position the company as an industry HVAC expert.	\$99.95

<p>Product ID</p> <p>1009</p>	<p>Commercial Lead Generation Outbound Sales Call Script</p> <p>Lead generation is about building your customer base by retaining and adding new customers. Lead generation is an essential business process to consistently acquire new commercial business through the design, production, and direct marketing tasking efforts within your sales area. Marketing is the same thing as lead generation, which is the process of systematic customer awareness communications. The process involves using a 12-step lead generation implementation plan:</p> <ol style="list-style-type: none"> 61. Identify capabilities as derived by you and your staff's experience and expertise. 62. Identify packages of offerings based on your staff capabilities. 63. Identify target markets that fit your capabilities. 64. Obtain a target commercial business list of owner-occupied industries. 65. Import into a contact management program (e.g., Outlook). 66. Set specific weekly goals for the number of prospects contacted, called, mailed & follow-up. 67. Set specific weekly new business appointments. 68. Clean target group list with decision makers names. 69. Mail introduction letter and line card. 70. Follow-up to identify client scope of work and develop proposals. 71. Set an appointment to present and close the business. 72. Reporting lead generation performance to a business development plan. 	<p>\$99.95</p>
<p>Product ID</p> <p>1010</p>	<p>Performance Tasking & Quota Tracking & Reporting in MS Excel</p> <p>To report Actual Sales Tasking Plan to Quota Performance for:</p> <ul style="list-style-type: none"> • Sales Tasking Quotas - It is the Sales Manager identifies that sets Sales Rep tasking plan quotas for service agreements and jobs by individual Sales Reps. • Demand Service Performance Measurement - At the end of each day/week, the Sales Rep's total actual new account Demand Service and total sold to date are tracked by Service Manager and reported to the Sales Rep and the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Service Agreement Performance Measurement - At the end of each day/week, the Sales Rep's total actual Service Agreements and total Service Agreements sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. • Project Performance Measurement - At the end of each day/week, the Sales Rep's total actual Projects and total Projects sold to date are tracked by Sales Rep and recorded to the Sales Manager on a Job Authorization form and posted on Sales Goal Board by the Sales Manager. 	<p>\$99.95</p>

3. 1-hour part three:

- a. Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- b. Technician Repair Call Check-in Opportunity Assessment Forms.
- c. Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.

d. Subscription provided or purchase these documents:

<p>Product ID 1011</p>	<p>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep:</p> <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. • To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	<p>\$99.95</p>
<p>Product ID 1012</p>	<p>Technician Repair Call Check-in Opportunity Assessment Form In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form</p>	<p>\$99.95</p>
<p>Product ID 1013</p>	<p>Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled System Condition Report. This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. 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.</p>	<p>\$99.95</p>

4. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

Product ID 1018	Service Agreement Sales First Call Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
1019	Commercial Service Agreement Short Form & Long Form Proposal Templates Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
1020	Project/Design-Build Sales First Call Sales Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for project 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 after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
Product ID 1022	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part one:

- d. Sales Objections Always Fall into 1 of 5 Categories.
- e. The 4-Step Consultative Trust Selling Approach.
- f. Proactive Repair Trust-Selling Standard Procedures.
- g. Proactive Service Agreement Trust-Selling Standard Procedures.
- h. Types of Commercial Service Agreement Inspection & Repair Coverages.
- i. Service Agreement Maintenance Options.
- j. Pros & Cons by Service Agreement Type of Coverage.

k. Subscription provided or purchase these documents:

Product ID 1014	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 MS Word format to be printed on your local printer.	\$99.95
Product ID 1015	Proactive Service Agreement Sales Call Handling Tasking Procedures Service managers and commercial Sales Reps use this standard procedure document to perform the step-by-step functions of a professional service agreement call handling step-by-step procedure from a lead to sold agreement. This document is provided in original MS Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95
Product ID 1018	Service Agreement Sales First Call Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95

3. 1-hour part two:

- a. Proactive Service Agreement Trust-Selling Standard Procedures.
- b. Example: Commercial Service Agreement Long Form Maintenance Agreement.

c. Subscription provided or purchase these documents:

Product ID 1019	Commercial Service Agreement Short Form & Long Form Proposal Templates Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
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#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part two:

- a. Service Agreement Work Delivery Tasking Standard Procedures.
- b. Example: Commercial Service Agreement Cover letter and Proposal Agreement.

c. Subscription provided or purchase these documents:

Product ID 1024	Service Agreement Work Delivery Standard Procedures 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 MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part four:

- w. Equipment Start-up and Maintenance Tasking Standards.
- x. Management Quality Assurance Standard Procedures.
- y. Accounts Receivable and Payable Standard Procedures.

z. Subscription provided or purchase these documents:

Product ID	Equipment Start-up & Maintenance Tasking Procedures 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 MS Word format to be printed on your local printer.	\$159.95
1026		
1027	Accounts Receivable and Payable Standard Procedures Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

#6 How to Protect the Business with Proper Terms & Conditions

1. 1-hour:

- a. Invoices & Proposals are Both Promotional and Legal Contracts.
- b. Invoice Document - Demand Service Payment & Liability Protection Terms & Conditions.
- c. Proposal Document - Service Agreement Payment & Liability Protection Terms & Conditions
- d. Proposal Document - Project/Design-Build Payment & Liability Protection Terms & Conditions.

e. Subscription provided or purchase these documents:

Product ID	Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set 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
1030		

Selling Tech/Lead Tech/Technician Job Training Track

NOTE: To order documents, go to www.WendellBedell.com.

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#1 How to Price Your HVAC Services to Make a Fair Profit

1. 1-hour part-one:

- a. Light-Commercial Upfront Repair Pricing Method.
- b. Time & Material Repair Pricing Method.
- c. **Subscription provided or purchase these documents:**

Product ID 1001	<p><i>Done-Right Flat-Rate Price Guide</i></p> <p>You can order the Done-Right HVAC or Plumbing or as an Electrical repair guide. Select one repair guide for only \$39.95 per month, select two repair guides for only \$69.95 per month, or select all three guides for only \$79.95 per month, a 12-month subscription. <i>Includes upload data for QuickBooks™ or for your field management software.</i> Subscription consists of the following online training and resources:</p> <ul style="list-style-type: none"> • Technician Fix-Right Flat Rate USER Instructions. • Professional service call handling process. • Technician Service Call Handling Soft Skills for Proper Customer Communications. 	<i>\$39.95/M onth To \$79.95/M onth</i>
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Product ID 1002	Technician/Installer Onsite Hourly Truck and Travel Costs & Pricing Calculator Program in MS Excel This document is used by service and replacement management to calculate the upfront per trip truck and travel rate for your upfront repair and replacement price guides. This document is provided in MS Excel format with results printed on your local printer.	\$69.95
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2. 1-hour part-two:

- a. Commercial HVAC Service Agreement Pricing Method.
- b. Pricing Strategy on Older Large Tonnage Contracts to Lock-in Projected Future Repairs.
- c. Locking in Projected Repair Revenue Pricing Strategy Review.
- d. Subscription provided or purchase these documents:**

Product ID 1003	EasyPrice Service Agreement Sales Call Opportunity Assessment Form Mechanical rooms or central plant areas are logical starting points for multi-facility or multi-story facilities. Starting at the mechanical room or central plant gives the salesperson a better picture of how the conditioned air or water is distributed throughout the facility(s). Understanding how the HVAC/R system is distributed enables the salesperson to look for and ask pertinent questions related to system operating and maintenance tasking requirements.	\$99.95
1004	EasyPrice Service Agreement Estimating & Pricing Program MS Excel Service managers and commercial Sales Reps use this software to perform the step-by-step functions of a professional service agreement surveying, estimating, and pricing procedure. The benefit objective is to increase profitability by implementing a professional approach to accurately and efficiently gathering customer and scope of work job data, decreasing estimating human errors, reducing work-related risk liabilities, and by improving the customer’s understanding how service agreement proposal development standardization increases efficiencies while reducing business risk to the company. Includes a complete set of 72-built-in equipment and filter estimating labor and material standards for packaged RTU, built-up systems, central plant heating/cooling, and associated equipment. This software tool is provided in original MS Excel format.	\$499.95

#2 How to Stop Missing Opportunities with Lead Generation

1. 1-hour part three:

- a. Maximizing Sales & Minimizing Business Risk with Onsite Opportunity Assessment Forms.
- b. Technician Repair Call Check-in Opportunity Assessment Forms.
- c. Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms.
- d. Subscription provided or purchase these documents:**

<p>Product ID</p> <p>1011</p>	<p>Install-Right Project/Design-Build Sales Call Opportunity Assessment Form</p> <p>This Installed-Right Project Design-Build On-site Opportunity Assessment Survey Form assists the project Sales Rep identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right Project Survey objectives are to help the Sales Rep:</p> <ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. • To provide the means to complete the sales call and close the transaction in 2 sales calls or less. 	<p>\$99.95</p>
<p>Product ID</p> <p>1012</p>	<p>Technician Repair Call Check-in Opportunity Assessment Form</p> <p>In most cases, when the technician first arrives on a repair call, the system is dead. The system cannot speak for itself, so you must interview the customer about the patient. An Opportunity Assessment Survey form is needed to enable the technician to learn about the customer, the problem or issue, and other areas that may present opportunities to improve. Customers commonly desire improved comfort, health, safety, property, and financial situation. After confirming the purpose of the call and making introductions, the technician uses the script located at the top of the form</p>	<p>\$99.95</p>
<p>Product ID</p> <p>1013</p>	<p>Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms Entitled System Condition Report. This form lets the customer go forward with recommendations to save money or help avoid catastrophic failures. This form allows the company to continue communicating post-call with the customer to “harvest more opportunities” that need attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System Condition Report to the service manager for pricing work and following up with the customer on the recommended work that needs attention. 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.</p>	<p>\$99.95</p>

2. 1-hour part four:

- a. Service Agreement Sales Call Opportunity Assessment Forms.
- b. Install-Right Project/Design-Build Sales Call Opportunity Assessment Form.

c. Subscription provided or purchase these documents:

<p>Product ID</p>	<p>Service Agreement Sales First Call Handout Presentation</p> <p>This promotional tool is used by Commercial Sales Reps on a request for service</p>	
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1018	agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95
1019	Commercial Service Agreement Short Form & Long Form Proposal Templates Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
1020	Project/Design-Build Sales First Call Sales Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for project 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 after post-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer for only \$99.95.	\$99.95
1021	Project/Design-Build Agreement Proposal Template Commercial Sales Reps use this promotional and Project/Design-Build transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer.	\$99.95
1022	Commercial Design-Build Cover Letter and Statement of Qualifications Package in MS Word A statement of qualifications is an introductory resume section that is a brief outline of your relevant design-build HVAC skills, experiences, and achievements. It uses bullet points to show relevant qualifications tailored to the requirements of the commercial project you are bidding. It should include: <ul style="list-style-type: none"> • Highlight your construction skills and experiences. • Quantify your key achievements. • Show the prospect why you are an excellent match. 	\$99.95

#4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. 1-hour part one:

- d. Sales Objections Always Fall into 1 of 5 Categories.
- e. The 4-Step Consultative Trust Selling Approach.
- f. Proactive Repair Trust-Selling Standard Procedures.
- g. Proactive Service Agreement Trust-Selling Standard Procedures.
- h. Types of Commercial Service Agreement Inspection & Repair Coverages.
- i. Service Agreement Maintenance Options.
- j. Pros & Cons by Service Agreement Type of Coverage.

k. Subscription provided or purchase these documents:

Product ID 1014	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 MS Word format to be printed on your local printer.	\$99.95
Product ID 1015	Proactive Service Agreement Sales Call Handling Tasking Procedures Service managers and commercial Sales Reps use this standard procedure document to perform the step-by-step functions of a professional service agreement call handling step-by-step procedure from a lead to sold agreement. This document is provided in original MS Word, Excel, and Acrobat PDF format to be printed on your local printer.	\$99.95
Product ID 1018	Service Agreement Sales First Call Handout Presentation This promotional tool is used by Commercial Sales Reps on a request for service agreement 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-service agreement execution. This promotional piece is provided in original MS PowerPoint format to be printed on your local printer..	\$99.95

2. 1-hour part two:

- a. Proactive Service Agreement Trust-Selling Standard Procedures.
- b. Example: Commercial Service Agreement Long Form Maintenance Agreement.
- c. Subscription provided or purchase these documents:**

Product ID 1019	Commercial Service Agreement Short Form & Long Form Proposal Templates Commercial Sales Reps use this promotional and service agreement transaction contract. This promotional piece is provided in original MS Word format to be customized to your business and printed on your local printer for only \$99.95.	\$99.95
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#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour part one:

- d. Advantages of Work Delivery Tasking Standards.
- e. Business Functions are the Labor Tasking Activities That Must Occur.
- f. Service Repair Work Delivery Tasking Standard Procedures.
- g. Subscription provided or purchase these documents:**

Product ID 1023	Service Repair Work Delivery Standard Procedures 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 MS Word format to be printed on your local printer.	\$159.95
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2. 1-hour part two:

- a. Service Agreement Work Delivery Tasking Standard Procedures.
- b. Example: Commercial Service Agreement Cover letter and Proposal Agreement.

c. Subscription provided or purchase these documents:

Product ID 1024	Service Agreement Work Delivery Standard Procedures 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 MS Word format to be printed on your local printer.	\$159.95
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3. 1-hour part four:

- aa. Equipment Start-up and Maintenance Tasking Standards.
- bb. Management Quality Assurance Standard Procedures.
- cc. Accounts Receivable and Payable Standard Procedures.

dd. Subscription provided or purchase these documents:

Product ID 1026	Equipment Start-up & Maintenance Tasking Procedures 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 MS Word format to be printed on your local printer.	\$159.95
1027	Accounts Receivable and Payable Standard Procedures Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original MS Word format to be printed on your local printer.	\$99.95

Human Resource Manager Job Training Track

NOTE: To order documents, go to www.WendellBedell.com.

Pilot - How to Master a Thriving Commercial HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need managers in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#7 How to Retain the Best People with Proven Employee Retention Strategies

1. 1-hour part one:

- a. Five Business Processes That Positively Affect Employee Retention.
- b. Implementing Step-by-Step Work Delivery Standard Procedures.
- c. **Subscription provided or purchase these documents:**
 - vii. N/A

2. 1-hour part two:

- a. Implement Performance-Based Job Descriptions.
- b. Implementing Labor Billable Efficiency & Productivity Monitoring.
- c. **Subscription provided or purchase these documents:**

Product ID 1032	<i>Performance Incentive plan - Office, Technicians & Installer</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95
1033	<i>Performance Incentive plan - Commercial Sales Rep</i> Service managers and operations managers use this document. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

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 documents are provided in MS Word format to be printed on your local printer. Set includes:	
1031	<ul style="list-style-type: none"> ● Dispatcher Job Description ● Commercial Sales Rep 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 	\$99.95

3. 1-hour part three:

- a. Implement Performance Incentive Plans.
- b. Implementing a Company Culture of Success.
- c. **Subscription provided or purchase these documents:**
 - i. N/A

#8 How to Drive Profitability Using Key Performance Indicators

1. 1-hour:

- a. Keep your Business on Track Using KPIs.
- b. Establishing Financial & Labor KPIs.
- c. Common Industry Average Financial KPIs.
- d. Drive Profitability Using Financial KPIs.
- e. Using Rules-Based Management to Drive Financial KPIs.
- f. Prevent Running Out of Money Using Break-Even Revenue KPIs.
- d. **Subscription provided or purchase these documents:**
 - i. N/A

#9 How to Efficiently Organize the Business for Growth

1. 1-hour:

- a. Why We Need to Organize Business into Groups.
- b. Commercial HVAC Business Organizational Structure.
- c. Five Logical Commercial Organizational Groups/Departments.
- d. Office Admin Department Functions & Organizational Structure.
- e. Sales Department Functions & Organizational Structure Service.
- f. Service Functions & Organizational Structure.
- g. Installation Department Functions & Organizational Structure.
- h. Construction Department Functions & Organizational Structure.
- i. Subscription provided or purchase these documents:**

Product ID 1036	<p><i>Commercial HVAC Service Contractor Organizational Charts</i></p> <p>Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company's book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all commercial HVAC companies should be organized in such a way as to compete competitively.</p>	\$69.95
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#11 How to Forecast Your Monthly Spend Plan

1. 1-hour:

- a. Why You Need a Monthly Spend Plan Budget.
- b. Forecasting Labor Staffing Requirement by Work Category Procedure.
- c. Using BudgetPro to Develop Service Offerings Spend Plans.
- d. Subscription provided or purchase these documents:**

Product ID 1039	<p><i>BudgetPro Annual & Monthly Budgeting Calculator</i></p> <p>One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. BudgetPro calculator is used by owners, general managers, service managers, installation managers, operations, and office managers. BudgetPro does everything a Guide version does, but more accurately and in a tenth of the time. The BudgetPro program is designed to help you quickly</p>	\$159.95
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	respond to potential new business scenarios. This program is provided in MS Excel format.	
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#12 How to Recruit and Retain Top Performers

3. 1-hour part one:

- a. Proven Strategies to Help You Recruit the Best.
- b. Proven Strategies to Help You Retain the Best.
- c. Why Contractors are Making Bad Hiring Decisions.
- d. The Many Costs of Making a Bad Hire.
- e. Here are 9-Tips for Hiring the Right Candidate.
- f. Checklist for Hiring Employees.
- g. Checklist for Screening an Applicant Resume.
- h. Subscription provided or purchase these documents:**
 - i. N/A

4. 1-hour part two:

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.
- e. Subscription provided or purchase these documents:**

Product ID 1037	Employment Application 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 MS Word format to be printed on your local printer.	\$69.95
1038	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original MS Word format to be printed on your local printer.	\$69.95

#13 How to Select and Implement Field Management Software

2. 1-hour:

- a. Benefits of Field Service Management Software.

- b. Checklist for Selecting Field Service Management Software.
- c. **Subscription provided or purchase these documents:**
 - i. N/A

#14 How to Self-Develop Your Leadership and People Skills

2. 1-hour:

- a. Different Leadership Styles and When to Use Them.
- b. The Top Leadership Skills to Improve.
- c. Implement Your Leadership Skill Self-Development Plan.
- d. **Subscription provided or purchase these documents:**
 - ii. N/A

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Wendell Bedell, President, Grow My HVAC, CEO, Join HVAC Success, and the HVACPro Business Club

He has established himself as an expert sales trainer, business manager, author, and inspirational speaker in demand nationwide and Canada. He has trained thousands of HVAC professionals, conducted several hundred HVAC Business Evaluations, and authored seven residential and commercial marketing, sales, and general-service management publications.

He has over 25 years of experience as a proven General Manager, Operations Manager, Sales, and Marketing manager developing successful residential and commercial-industrial HVAC service businesses. He has been a keynote speaker and trainer for ACCA, Design-Build Seminar, Comfortech, HVAC Service Summit, MSCA, CMX & HRAC of Canada. He has sat on the Contractor Magazines Advisory Board.

Before founding Grow My HVAC, in 1998, he was President of Excellence Alliance University, an HVAC and electrical training subsidiary of Excellence Alliance, Inc., with functional responsibility for day-to-day operations, residential and commercial-industrial education program development, and instruction.

As Strategic Regional Manager, he was responsible for the product, promotion, and business delivery development and for recruiting, staffing, training, and deploying the account executives, design engineers, and project managers. Before that, he worked for Boston Edison and Central Maine Power for three years, establishing two high-technology design/build and energy services businesses. He was also on the sales staff of the largest independent mechanical services contractors in the Northeast -- BALCO, Inc., Boston, MA, New England Mechanical Services, Hartford, CT, and Johnson Controls, Hartford, CT.

As Account Executive and Sales Manager, he won three consecutive national Most Valuable Performer Awards and several Top Managers Awards.

He holds a Master in Business Administration from the University of Hartford (1990), a Bachelor in Business Management, Westfield State College (1987), and an Associate in Industrial Electronics, New Hampshire Technical College (1981).

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