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Lead (Don't Manage) Employees

- Field Management Software
- Hurricane Compliant Louvers
- Marketing Reminders

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¹Per a MIAT Commercial HVAC Competitive Time Study, conducted June 4–6, 2019.



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VOLUME 78, NUMBER 6

June, 2021

Employee management at its best involves incorporating principles of leadership and team development.

Photo: designer491/Stock/GettyImages

Contracting Business®

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HVACR hotmail eNEWSLETTER

Fascinating Air Properties

Rob 'Doc' Falke illuminates a basic principle that's one of the foundations for all you do in HVAC.

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Matt Michel offers free sales/marketing image downloads from the Service Roundtable's content archives.

This month: Helpful list of shortcuts when using Microsoft Suite
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POPULAR ONLINE GALLERIES

LEFT: 2021 Air Conditioning Guide
bit.ly/CB2021acguide
RIGHT: A May Product Gallery
bit.ly/MayCBproducts



Reader Services

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Owner

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BY TERRY MCIVER, EDITOR-IN-CHIEF

Summer HVAC Reading

Include these in your summer beach reading. *Lead Don't Manage*, by Mark W. Williams. Chapter 4 of Mark's book is reprinted on page 20-22. In it he describes the many ways a manager must engage and inspire employees rather than simply track their time and productivity. Williams, CEO of Brokers International, writes about the ways in which key principles — goal setting, communication, brand development, performance, motivation and incentives — are firmly linked to the company's greatest asset, its employees.

NEXT LEVEL NOW: PR Secrets to Drive Explosive Growth for Your Home Service Business, by Heather Ripley (2021, Advantage Publishing).

Ever wonder why a competitor appears in local TV news segments or has a column in the local paper? The answer is public relations.

Heather Ripley and her team specialize in public relations for home service companies. Her book contains public relations strategies to increase service business credibility, in a way that will help it generate more customers and revenue. Topics include strategic analysis of your business, knowing the competition, how to manage online reviews and more.

Patterned after Excellence: Pursuing Truth in Work and Life, by Brigham Dickinson.

Patterned after Excellence begins with Brigham Dickinson at a crossroads following a failed business venture. It's a situation that can either motivate, or drive one deeper into despair. Dickinson chose survival. He came to realize that every business needs a soft, gooey center call a HEART, and used that truth to design a series of eight principles for service industry success based on "relationships", not transactions.

HVAC Spells Wealth, and *More HVAC Spells Wealth*, by Ron Smith. *HVAC Spells Wealth* is the bible of HVAC success, written by a legend. Just ask the many who have used Ron Smith's principles to shape their own HVAC success stories. Ron Smith did much of this industry's business management groundwork at his first company, Modern Air Conditioning. His

methods empower many of today's most successful HVAC businesses. Topics include processes, customers, coworkers, marketing, sales, how to price for 25 percent net profit, and the value of the HVAC industry.

The Power of Positive Pricing: How Much is Your Pricing Costing You?, by Matt Michel. (Available at <https://shop.serviceroundtable.com>.) You read Matt Michel's columns in CB print and online, and each is better than the last. One of the HVAC industry's best "truth tellers", Michel tells it like it is:



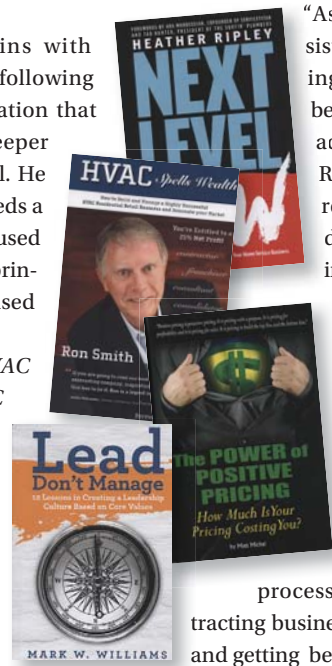
"This book was written because most service company owners take a simple-minded approach to pricing. They ignore the strategic aspects of price. They think of pricing in terms of dollars and cents, ignoring the fact that pricing is a marketing weapon." Michel includes common pricing scenarios: service and overtime pricing; response pricing; material markup; the effective hourly rate; price elasticity; service agreements; installation pricing; and nine more.

Consistency Selling: Powerful Sales Results. Every Lead. Every Time, by Weldon Long. Nothing is more frustrating than roller-coaster sales from your team. Weldon Long believes irregular sales performance is rooted in inconsistent methods.

"As long as your sales activities consist of walking into a call and winging it, your sales results will always be sporadic," Long writes. "Consistent activities produce consistent results. Random activities produce random results." He says sales consistency derives from relationship building, investigating, selling your company and its solutions, and understanding market segmentation.

The E-Myth HVAC Contractor, by Ken Goodrich and Michael Gerber, combines the methods used by Goodrich at Goettl Air Conditioning with those of E-Myth author Gerber, to provide

a path to establishing precise processes and systems in an HVAC contracting business. I hope your business is thriving and getting better! **CB**



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Tempo, Inc. Names Brian Mount CEO; Steve Saunders Assumes Advisory Role

The Board of Directors of Tempo, Inc., Dallas-Fort Worth, Tex., has named Brian Mount the new chief executive officer.



Brian Mount

Mount's appointment follows the news of the retirement of Tempo CEO Steve Saunders, who will assume an advisory role with the company, a leader in residential comfort solutions. Saunders had served Tempo as CEO for 22 years.

Tempo, Inc. consists of four business operating units: Tempo Service, Tempo HVAC, Tempo Commercial, and TexEnergy/US Ecologic Solutions.

Mount will continue the Tempo tradition of people-oriented, client-centric and technically proficient leadership. A 10-year veteran of the company, Mount started in 2010 with the US-Eco Logic Multifamily Team and worked as a project manager for the Building Science and Consulting Group for several years.



Steve Saunders

Read more online, at <http://bit.ly/MountTempoCEO>.

CoolSys Acquires Duquette Refrigeration

Brea, Calif. -- CoolSys™, parent company of numerous market-leading refrigeration and HVAC services companies across the US, has announced the acquisition of Duquette Refrigeration (formerly A. Duquette & Son), a commercial refrigeration company headquartered in Worcester, Mass. This acquisition will strengthen CoolSys's Commercial &



Refrigeration rack. Photo credit: Duquette.

Industrial division and broaden its presence in the Northeast region. He transferred to the Tempo Mechanical Division as a project manager providing HVAC design and installation services to one and two-family new construction residences. Mount was next selected to head company's sales, back office, and engineering teams.

Established in 1986 as A. Duquette & Son, Duquette

Refrigeration has provided HVACR service and installations for supermarkets, convenience stores, refrigerated warehouses, manufacturing, commercial office and retail customers for 35 years. coolsys.com Read more online, at <http://bit.ly/Coolsysduquette>.

Climate Pros Acquires Precision Mechanical



Refrigeration rack installation. Photo credit: Climate Pros.

Glendale Heights, IL - Refrigeration contracting business Climate Pros announced on May 1 the acquisition of Precision Mechanical Contracting a leading supplier of Refrigeration and HVAC services founded in 2005, serving Northeast regions of Maryland, New Jersey and the greater Philadelphia area.

Climate Pros provides refrigeration maintenance, repair, remodel and installation services to grocery retailers and other cold-chain customers. Customers of the company include Safeway, Costco, Target, Amazon, Walmart, Whole Foods and others. climatepros.com Read more online, at <http://bit.ly/climateprosprecision>.

HomeServe USA Acquires Mark Allen Plumbing and Heating

NORWALK, Conn.-- HomeServe USA, a leading provider of service plans, repair, and installation services for the home, has acquired Mark Allen Plumbing and Heating, based in Bethel Park, Pa. a suburb of Pittsburgh. Mark Allen Plumbing and Heating provides plumbing and HVAC services to residential and commercial customers in the greater Pittsburgh area.

Mark Gillece founded the Mark Allen business in 1985 and has served as its leader ever since. He's grown this business to include a team of 21 skilled trade plumbing and HVAC professionals dedicated to serving their neighbors in and around the Steel City. homeserve.com Read more online, at <http://bit.ly/homeservemarkallen>. **CB**

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a finalist in the 2021 AHR Expo Innovation Awards.

The Model L packaged rooftop line boasts efficiency ratings among the highest in the industry with leadership models in SEER, IEER, and EER. Featuring both gas-electric and electric-electric units, the Model L is available from 3 to 25 tons of nominal cooling capacity.

For more information about the Model L, visit lennoxcommercial.com

Commercial Rooftop System

Lennox International officially revealed the Model L packaged rooftop line during the first-ever Lennox Commercial Product Showcase, presented online in April.

94788Lennox Model LC Box HeroThe light commercial HVAC system features an all-new rooftop controller, the Lennox CORE Control System and Service App, which was

special advertising section

Commercial Rooftop System

Daikin Applied announced on May 11 updates to its Rebel Applied™ packaged rooftop HVAC system, known for its leading airflow and efficiency ratings, and compact footprint. Rebel Applied now comes with inverter scroll compressors, precision temperature and humidity control, and adaptive refrigeration technology, expanding its ability to provide unmatched energy efficiency and enhanced indoor comfort.



Daikin Rebel InverterDriven by Daikin inverter technology, these new features boost Rebel Applied's already best-in-class efficiency. Unlike staged compressors that operate at fixed points, the inverter technology modulates compressor and cooling capacity continuously from 100 percent down to 15 percent so the system dynamically responds to match the load of a building.

Rebel Applied is equipped with several indoor air quality (IAQ) technologies available as factory-installed options, including: UV lights to kill pathogens and prevent microbes from living in the unit, high-efficiency pre and final filtration to capture more contaminants, and humidifier grids that help produce ideal building environments.

daikinapplied.com

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Fieldpiece Instruments

These two new Fieldpiece leak detectors are highly sensitive, durable, and more reliable than anything else on the market. The new models feature a large LCD that displays leak information with bar graphs and numerical values. Leaks trigger a lighted tip and audible alarm. The rechargeable batteries enable 10 to 18 hours of use per charge.

Visit fieldpiece.com for more information.



Residential Comfort & IAQ

In late April, the home comfort and IAQ experts from Lennox Industries shared updates to The Ultimate Comfort System.™ It combines the best of the Dave Lennox Signature® Collection to create an unprecedented whole-home



comfort system that seamlessly and intelligently works together to stay finely tuned to your home and deliver consistently clean, perfect air, sources report.

The SLP99V Variable-Capacity Gas Furnace, SL28XCV Air Conditioner and XP25 Variable-Capacity Heat Pump keep the home's air "perfect," by continuously circulating and making adjustments to the air. Lennox sources say this ongoing movement ensures the air in the home is cleaner and maintains the occupants' ideal humidity by passing it through both the air purification and dehumidification systems. lennox.com

Louver

The new HZ700 louver from Ruskin® is a 7-in. deep louver comprised of two pieces – a 4-in. horizontal front and a 3-in. vertical rear louver. The HZ700 was designed for applications needing a horizontal blade appearance but a vertical blade level of performance.

The HZ700 meets AMCA 550 and AMCA 540 standards for enhanced protection, and has a low pressure drop, which delivers greater energy savings. ruskin.com/model/hz700.



Vacuum Pumps

Fieldpiece Instruments announced a new generation of vacuum pumps that are small, lightweight, portable, and allow fast, time-saving vacuum evacuation to make the HVACR professional's job easier and more efficient. The new Fieldpiece pumps include three different CFM



models that can be used in a variety of applications. The Fieldpiece top-of-the-line VPX7 pump is the lightest of the three new pumps due to a patent-pending manufacturing process resulting in a pump that is lightweight and

manageable for the pro to carry.

HVACR technicians can choose the vacuum pump that is best suited for them, depending on the system and pump feature preference. Model VPX7 is a fast and efficient 10 CFM DC Motor and is perfect for large commercial and refrigeration applications.

The patent-pending interior EPO coating, which is a high-energy surface treatment to high strength aluminum alloy, makes the VPX7 pump portable enough to climb up a ladder or move to other areas where needed. In addition, the coating is extremely tough as well as chemical and wear-resistant, so the life of the VPX7 pump is extended. Model VP87 is an 8CFM DC for light commercial and residential systems replacing the legacy VP85. For residential service and installation, HVACR pros will choose the VP67, 6CFM AC model, replacing the current VP55 (5CFM). The three new vacuum pumps from Fieldpiece Instruments offer HVACR professionals a more efficient way to pull vacuum in A/C and refrigeration units either prior to adding refrigerant on a new installation or when performing a system repair.

bit.ly/Fieldpiecenewpumps.

Ventilation

Greenheck's new model OPA is a configurable open plenum array that can be designed and optimized for a specified height and width. With customization available based on sound, horsepower, number of fans, or overall efficiency criteria, the open plenum array offers multiple solutions for a variety of performance needs.

Constructed of foam-filled galvanized steel panels within a laser cut and formed galvanized steel structure, the OPA can be specified in sizes up to 96 inches in height and 636 inches in length. The array can be powered with NEMA premium AC induction motors up to 10 hp or three-phase Vari-Green® motors with an integrated drive providing industry-leading IE5 efficiencies. Seven wheel sizes are available with aluminum wheel construction as standard on all selections. Optional airfoil construction is also available. Greenheck's factory-tested and fully assembled Open Plenum Array is ideal for data center, mission critical, and custom air handling applications.



greenheck.com CB

FIND ADDITIONAL DESCRIPTIONS OF THESE PRODUCTS AND MORE, IN THE PRODUCT GALLERY AT <http://bit.ly/CBjune2021products>.

Field Management Software

FieldEdge - xplortechnologies.com/products/fieldedge

Part of Xplor Field Services, FieldEdge is an all-in-one solution for home & field services companies. FieldEdge is the ultimate industry-leading field management software solution that empowers field service contractors to simplify and organize their work. Connecting the field, office, and customers by a single, cutting-edge and easy-to-use application, contractors can grow their business while spending more time on what matters.

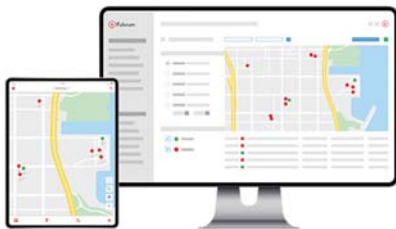


is the ultimate industry-leading field management software solution that empowers field service contractors to simplify and organize their work. Connecting the field, office, and customers by

Field Edge Desktop: gain valuable insight on how your business is doing with key performance indicators
 FieldEdge Mobile: take your operations on the go with a powerful mobile solution. FieldEdge Payments: take your operations on the go with a powerful mobile solution; access customer information, add notes and provide top notch customer service. FieldEdge Flat Rate: present prices upfront with confidence, to build trust between your techs and customers; price right and turn a profit on every repair.

Fulcrum - fulcrumapp.com

A new release of the Fulcrum no-code platform is delivering unique, location-aware options to maximize the performance and agility of field teams as they execute safety, quality, and other programs. In addition to using



Fulcrum to modernize their mobile workforces with data collection, intelligent automation, and data-driven insights, Fulcrum now also offers direct integration with geographic information systems such as Esri™ ArcGIS™.

When contracting companies use Fulcrum to create mobile apps and intelligently automate workflows, they open up the possibility of easily creating “apps with maps” that provide location context for field teams’ inspection, asset management, equipment installation, and other activities – without writing code. Fulcrum also connects these field

activities with the back office by automatically tagging records with location data and supplying built-in location intelligence to anyone who has permission to see the information.

As a result, Fulcrum clients are reducing their use of paper checklists, physical maps, spreadsheets, and other cumbersome work processes among their widely dispersed teams. Not only is their field time more productive, they also cut the time needed to customize or create new apps and workflows from weeks to minutes, enabling greater agility than they could achieve with pen and paper.

Intelligent Mobile Support - imobilesupport.com

Intelligent Mobile Support, Inc. launched Sales Builder Pro 8, which now includes Deal Manager, a powerful new feature set to help improve the sales process for busy HVAC contractors and other in-home service providers.



Deal Manager makes it easier for contractors to track pending proposals, receive customer approval remotely, and communicate and collaborate across their organizations. From comfort consultants to office workers, sales managers, install managers, and owners, Deal Manger helps contractors build a better business.

By simplifying how information is captured, organized, stored, and shared across the company the comprehensive Deal Manager tool makes it easy to track and manage job proposals and installs.

New Deal Manager features include Pending Deal Search, Remote Acceptance, Notes, and Document Management. Together these features enable contractors and their teams to manage their sales processes more effectively while also managing the jobs and installs they have won.

Advanced capabilities of Deal Manager include: Pending Deal Search Remote Deal Acceptance Improved Deal Management Deal Notes Documents Proposal Status Reports and Analytics.

Podium - podium.com

Podium, the leading communication and payments platform for local businesses, today released the 2021 State of Payments Report

--podium.com/state-of-payments/ -- highlighting the types of payment methods customers use, their preferences and the impacts local businesses may face if they don't support their customers with frictionless payment methods.





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According to the report, U.S. consumers are comfortable spending 43% more money swiping their credit card than paying with cash, and 53% more compared to reading their credit card numbers over the phone to a representative. A third (33%) of all (U.S. and Australia) respondents listed swiping or inserting their credit cards as their preferred method of payment, and nearly a quarter (23%) of consumers abandon transactions entirely when their preferred methods of payment aren't available. Enabling more ways to pay, especially preferred ways, will help local businesses drive repeat customers.

The report revealed that customers want convenient payment options. Being offered convenient payment options (41%) is the second most important factor customers consider when choosing a local business, next to customer service (60%). Preferred payment options were more important to customers than proximity to their home (36%), availability of sales or discounts (25%) or a personal relationship with the business (20%), among other elements.

.....
Sage 300 CRE- sagecre.com

Formerly Timberline® Software, SAGE 300 CRE offers contractors, developers, and property managers comprehensive functionality for managing risks related to subcontractors

and vendors, customizable reports and powerful add-ons that improve visibility, and tools

that enable real-time collaboration throughout all phases of a project anytime, anywhere. Each construction project is built upon an intricate web of data, countless decisions scattered across multiple teams, and numerous workflows. SAGE offers SAGE 300 Construction and Real Estate (CRE) as a solution to project disorder. Described by SAGE as the industry-leading construction and financial management solution, SAGE 300 CRE is designed to manage entire project and property lifecycles. SAGE 300 CRE integrates accounting and project management data, to create a comprehensive overview of business performance. Each user experience is tailored to fit a unique role, to seamlessly facilitate collaboration and improve productivity.

Real-time updates inform data-driven decisions, and SAGE 300 CRE integrations give project managers the power of choice, in best-of-breed operational solutions. Streamline workflows, bring field and office teams together, and discover clarity in untangling your web of project data.



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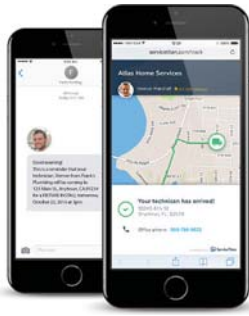
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Item	Qty	Unit Price	Total
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Acorn 1 Light Pendant - Copper	2.00	\$37.50	\$75.00
Acorn 1 Light Pendant - Nickel	2.00	\$50.00	\$100.00
Edison 1 Light Bulb - 40W Warm White Vintage	2.00	\$5.24	\$10.48
Edison 1 Light Bulb - 40W Warm White Sylvania	2.00	\$6.90	\$13.80

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Are Your Louvers Hurricane Compliant?

It's important to know the difference between two high-velocity wind-driven rain testing standards: TAS-100A and AMCA 550.

by Joe Rockhold

The 2020 Atlantic hurricane season was the most active on record, generating 30 named storms - 12 of which made landfall. As climate change continues escalating both the number and intensity of dangerous storms, protecting people and property in these vulnerable areas is now mission critical.

HVAC louvers, which are used to provide fresh airflow in a facility, can sometimes allow wind-driven rain into buildings during severe storm events, causing significant damage to the structure and equipment. There are two louver test standards developed to test for these high-velocity wind-driven rain events - TAS-100A and AMCA 550.

TAS-100A is the original Miami-Dade (Florida Building Code) test standard developed in the 1990s after Hurricane Andrew caused widespread destruction in that area. TAS-100A was the original test method that set the standard louvers needed to meet to be considered resistant to high wind and wind-driven rainfall. AMCA 550 is the latest testing standard for hurricane louvers. This article provides an overview of these standards and compares the testing efficacy of both.

Property-protecting louvers Hurricane louvers are required to meet very stringent performance requirements, more so than regular louvers. Facilities along the eastern seaboard and Gulf Coast regions are required by International Building Code to install severe weather-resistant louvers in locations that require fresh-air intake or exhaust of carbon-dioxide-contaminated air. Hurricane louvers are specifically designed to resist the intake of excessive amounts of rainfall and debris carried by hurricane-force winds. Each hurricane louver is tested to specific standards and must be approved for use in a hurricane zone.

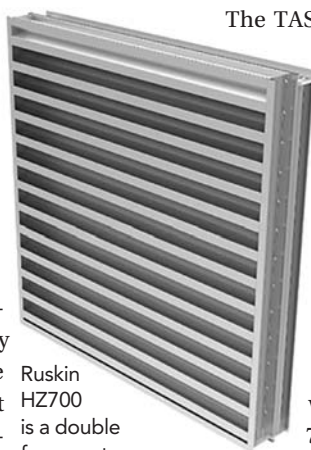


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Testing standards for TAS-100A The Miami-Dade Building Code of Compliance Office (BCCO) requires louvers installed “in a location where the room behind the louver is not designed to drain water penetrating into the room, or the room will house non-water-resistant equipment, components, or supplies” be tested in accordance with TAS-100A.

The TAS-100A standard uses a 48-inch-by-48-inch sample. Performance is tested against a rainfall rate of 8.8-inches per hour with wind gusts that are tested at a set number of minutes. The 35 mph, 70 mph and 90 mph tests are run for 15 minutes and the 110-mph test runs for five minutes.

After each test point, water that has passed through the louver is collected and weighed. To meet the more stringent TAS-100A standards, only 0.05% of the total water sprayed at it can pass through the louver, while at the first two set points of 35 mph and 70 mph, no water is allowed.



Ruskin HZ700 is a double frame extreme performance louver. Its two-piece blade design provides protection from wind-driven rain penetration, reducing damage and additional operating expenses. Photo credit: Ruskin.

Testing standards for AMCA 550

The AMCA Standard 550 Test Method for High Velocity Wind Driven Rain Resistant Louvers has a similar test method as

TAS-100A, but varies in water collection requirements, which make it more commonly specified.

AMCA 550 uses a 1-meter-by-1-meter sized sample to measure water damage impact. However, during the calibration of the test and measuring equipment, AMCA 550 requires collection of water at a different reference location. Similar to TAS-100A, the sample louver is mounted into a makeshift wall with a collection chamber inside the opening and an open top to allow a consistent air stream. The chamber's walls are lined with plastic or similar smooth surface to funnel any penetrating water into a collection device for measurement.

During the test, water is injected into an air stream and directed at the sample louver. The test measurements are conducted at the same wind speeds as TAS-100A - which are 35 mph, 70 mph, 90 mph and 110 mph - as well as at the constant flow of 8.8 inches of rainfall per hour.

While both standards are widely accepted by authorities having jurisdiction (AHJ) in hurricane-prone regions, Miami-Dade has recognized AMCA 550 as an equivalent to their own TAS-100A test standard.

Although both are often perceived as interchangeable, three key differences are highlighted below:

AMCA 550

Water collection measured cumulatively at 35, 70, 90 and 110 mph. The louver passes if no more than 1% of water penetrates the louver. Test size: 1 meter by 1 meter More commonly specified

TAS-100A

Water collection measured at 35, 70, 90 and 110 mph. The louver passes if there is no water collected on the first two points and only 0.05% of water penetration at the end of the test. Test size: 48 in. x 48-in. More stringent test, so not commonly used, but is commonly specified in Miami-Dade/ Florida region

Features of hurricane-compliant louvers

Most high-velocity wind-driven rain louvers have tight blade spacing with vertical orientations. The vertical blades use gravity to quickly drain the rain and reduce the risk of water puddles forming and blowing through the louver.

The industry does offer horizontal-bladed operable louvers, but they must be closed during a storm event to meet AMCA 550 requirements and must remain in the closed position until the storm subsides. Other products offer a combination of two louvers - typically a horizontal-bladed front louver and vertical-rear bladed louver.



Ruskin's EME5625MD has been engineered to provide added protection to buildings during hurricane conditions. Photo credit: Ruskin.

Finally, there is a louver and damper combination. With this combination, the damper must be closed during a severe weather event to satisfy AMCA 550. However, both the operable louver and louver/damper combination are not permissible in essential facilities - such as hospitals, fire and police stations - which must remain open during a weather emergency.

Both the Miami-Dade Notice of Acceptance (NOA) and Florida Building Code (FBC) websites offer complete listings of louvers that have been tested and approved to TAS-100A or AMCA 550 standards. Contractors can also review the louver product submittal sheet to confirm proper specification. Selecting the right louver, the first time will ensure approval from the authority having jurisdiction (AHJ) while helping protect buildings and occupants during an ever-expanding hurricane season. **CB**

Joe Rockhold is Louver Product Manager for Ruskin.

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Are You Managing or Just Keeping Track of Employees?

Many company managers 'grew' into the position, without true management experience. These managers must begin to develop skills in communicating, relationship-building, and helping a team set priorities. — by Mark W. Williams

While many managers clearly set goals to become managers, many more individuals became managers simply because they had been at their jobs a long time, and, as the company grew, those who were succeeding in their current jobs were assigned management jobs. Unfortunately, many of those who simply "grow" into their jobs have little to no experience in management. This is not to say this group of managers can't be effective at their jobs - with some training - but it's not an issue that should be ignored.

The Importance of Communication with Managers

Trained or not, it appears that one of the primary skills many managers are lacking is communication. OFFICEVIBE.COM reported that 69 percent of managers are uncomfortable communicating with their employees.¹ Since communicating is crucial, this statistic is dismaying, to say the least. Managers need to be communicating consistently and constantly with their employees. Further, employees both want and need feedback to get better at what they do.

When you consider that 50 percent of employees say they are quitting their boss, rather than their job, the importance of management becomes even clearer.

When you consider that 50 percent of employees say they are quitting their boss, rather than their job², the importance of management becomes even clearer. While good managers may have some innate skills that help them be good managers, virtually every manager could benefit from training and skill-building.

You might wonder just how often is often enough for employees when it comes to meeting with a manager. According to PREDICTIVEINDEX.COM, practices vary widely:³

- Nearly 14 percent of employees meet on a daily basis with their manager



designer491/Stock/Getty

- Almost 38 percent meet weekly with their manager
- 20 percent meet monthly with their manager
- Almost 5 percent meet once a year with their manager
- The remainder either never meet with their manager or meet so infrequently then find it difficult to remember the last time they spoke one-on-one with their manager.

Employees who reported they communicated often with their managers were also the happiest in their job - most employees crave communication with their manager. So, whether you're a manager who trained for the position, or a manager who possibly fell into the position, you can be the manager who truly manages, rather than simply keeping track of your employees.

What Skill Set Does Managing Require?

Management skills are abilities and attributes an executive should possess in order to fulfill specific tasks in an organization. Management skills can be developed through practical experience as well as through education. Managers must be able to deal well with subordinates, creating an easier flow of an organization's activities. Managers who have good management skills can propel the vision and business goals of an organization in a forward direction with fewer hurdles to navigate.

As a manager, the skills you think you need might be very different from the skills your employees wish you had, or even the management skills recognized as important by

those who train managers.

The highest-ranking skills necessary for good managers include the following:

RELATIONSHIP-BUILDING – Good managers develop the ability to build good working relationships with everyone – no matter their level – in the organization. Building these good working relationships takes time, skill and respectful management.

SETTING PRIORITIES – In a busy, growing organization, it can sometimes seem like an overwhelming task to get everything that needs to be done completed in a timely manner. Being able to prioritize is a critical management skill – think about how emergency rooms “triage” those who come in, assigning degrees of urgency to wounds or illnesses to determine the order or treatment. You will not only be prioritizing for the more urgent tasks, but as well as for the longer-term tasks.

EFFECTIVE ANALYSIS – The ability to consider many factors when making a decision is important. When financial concerns are the only criteria used, or when a manager is feeling rushed, bad decisions can occur. Because of this, it is extremely important that effective managers have a structured process to think through a problem. This process may include an analysis of the risk, or even ethical considerations, depending on the type of organization.

COMMUNICATING EFFECTIVELY – Communication skills are essential for managers – you may know exactly what you want to occur in your organization, but if you are unable to communicate those thoughts to your team and to higher-ups, then those goals will never be met. There are “Seven Cs” of communication that every manager should make a part of their everyday management skills: Communication should be clear, concise, concrete, correct, coherent, complete, and courteous.

COLLABORATION – This includes the ability to include employees in the problem-solving process. Yes, you are the manager, which may make you think you are responsible for solving every problem in your organization. If, however, you have hired a team of experienced people with the necessary skills, then this team can help you solve specific problems.

CUSTOMER FOCUS – The ability to cultivate customer relationships and solve customer’s problems (if your organization involves customers).

BUILDING TEAM TRUST – When members of your team do not trust one another – or you—time is wasted, and the results can be disappointing. On the other side, when your team members do trust their teammates – and you – the results can be truly amazing. Building trust requires actually getting to know your team or your employees and the ability to effectively communicate your wishes. When you lead by example, discouraging behaviors that breach trust, you may be surprised by the results.

USING EMOTIONAL INTELLIGENCE – “Emotional

Intelligence” includes such things as self-awareness, empathy, social skills, motivation, and self control. Emotional intelligence allows managers to behave in a smart, empathetic manner with employees and team members.

Are You Actively Engaged in Mentoring, Educating and Overseeing the Management Process?

One of the biggest mistakes made by managers is hiring great people, then providing little to no follow-up. To ensure great employees stay great employees, a good manager must always be engaged in mentoring, educating, and overseeing the management process as a whole. Think about this: disengaged employees contribute little to the goals of your organization while draining valuable resources.

Improve Training

It is the manager’s responsibility to improve and maintain employee engagement at all levels. Doing so requires employee training – one of the most effective tools for maintaining employee engagement. So, how can you improve employee training? Consider the following:

1. MAKE TRAINING A PRIORITY – Your role in training and development is an essential one and can involve daily interactions with your employees to let them know you believe training is a priority. You set the tone in your organization, and by fostering a learning culture within your organization you will improve employee satisfaction, decrease turnover, increase productivity, and foster a culture of knowledge sharing.

2. PARTICIPATING IN EMPLOYEE TRAINING – When you train side-by-side with your employees, you will gather insights into each employee you might not otherwise have seen. While most employees require – and welcome – frequent upskilling, far too few are provided with opportunities to develop both their technical skills and their “soft” skills.

3. VALUING DEVELOPMENT – Let your employees know you value education and development. Employees who believe they are going nowhere in their job – that they are stuck in a rut, with no clear path for moving forward—are the very employees who will soon start looking elsewhere for a new job. It is vitally important that you communicate through words and actions that you value the growth of employees. You can do this by seeking out training opportunities, then ensuring your employees are given sufficient time for training.

4. PROVIDING OPPORTUNITY – Give your employees opportunities to practice their new skills and knowledge on the job. Why invest time and money in employee training if your employees will not be given plenty of opportunities to practice what they learn at work? As a manager, you can collaborate with trainers to provide practice opportunities in the form of eLearning scenarios, “safe to fail” spaces, role-

BUSINESS OPERATIONS

playing with colleagues, and much more. When more complex skills need to be practices in the workplace, managers can provide support and encouragement.

5. SETTING GOALS – Provide goals for your employees, but make sure you also provide a specific plan for achieving those goals. Remember – those things that can be measured can be achieved; work with employees to establish new areas for development, then find ways to quantify those goals.

Are You Keeping Up with Management Trends?

Like anything else in our fast-paced world, management trends change from year to year. As a manager, you have an obligation to your employees to keep up with these trends, as well as the discernment to determine which trends are applicable to your organization, and the knowledge of how to implement those trends.

As an example, the year 2020 has highlighted (like no other year ever has), the importance of remote work. Many organizations across the nation were blindsided by the pandemic and the necessity of allowing employees to work from home.

Managers who were following this trend prior to the pandemic had much easier transitions in the remote-working arena. Even in a “normal” environment, telecommuting can be beneficial for businesses as well as employees and their families. Productivity is boosted, employees are closer to their families, and commuting costs are reduced when technologies such as Zoom, Cloud, Skype, and other data mobility solutions are implemented.

Other current management trends include the following:

Recruiting influencers from within the organization to share and promote company products/services. Ensuring employees’ wages are increasing to meet inflation by revising company compensation plans Understanding the significance of artificial intelligence to enhance customer experience and satisfaction Bringing in outside consultants to infuse an organization with new ideas, information and knowledge Providing continuing education for employees Helping employees to have a good work-life balance Ensuring your millennial employees are fully trained to take on new responsibilities and participate in tasks.

As the manager your organization or department, it is essential to continue your own education in management trends to ensure that your employees and your organization don’t grow “stale.”

Are Your Employees Moving Up and Moving On?

Are your employees simply moving laterally, out of your department, or moving up and moving on as a result of your advocating on their behalf? As the manager, you need to be fully invested in the success of every one of your em-

ployees. Bored employees who are stuck in a rut, may move out of your department but not move UP. When you invest in the future of your employees, you are simultaneously improving company culture and developing a positive, productive workplace.

Make sure your employees know when you consider them a valuable asset to the company – and that they can always turn to you for direction and support. Employees who feel supported have much higher levels of job satisfaction and are much more likely to consistently perform at the top of their game. In other words, it’s a win-win for you and your employees. Even if you believe an employee’s goal is to move forward outside of your organization, you have a responsibility to be supportive of the career goals of each and every employee.

Are Your Employee Metrics Consistently Improving?

Tracking team member performance is important. Not only do talented employees want and need feedback to help them grow and improve, it simply makes good managerial sense to keep track of what goes on in your business. That being said, quantifying and measuring employee performance metrics is easier said than done. While there are a number of metrics that can be successfully used to track the progress of team members, the ones you choose will depend on your business and the roles of different team members. Some businesses use productivity tests, others use 360-degree feedback, while still others use management by objectives.

Some metrics to consider for your organization include: attendance metrics; “helpfulness” metrics; efficiency metrics; initiative metrics; and quality of work metrics. **CB**

¹ “4 Shocking Statistics that Every Manager Needs to Know,” 24 Nov. 2016 – <http://bit.ly/4shockingstats>

² “4 Shocking Statistics that Every Manager Needs to Know,” 24 Nov. 2016 -- <http://bit.ly/4shockingstats>

³ Shannon Howard, “25 People Manager Stats You Need to know,” PREDICTIVEINDEX.COM, September 27, 2019.

This article is excerpted with permission from “Lead Don’t Manage; 12 Lessons in Creating a Leadership Culture Based on Core Values,” by Mark W. Williams.

Find a description of the performance metrics and the entire article online, at <http://bit.ly/LeadDontManageCB>.



Mark W. Williams

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Practical Ways for HVAC Contractors to Improve Their Marketing

There are some simple and practical steps you can start with to get more attention, attract new clients, and book new appointments.

by Tammy Vasquez

HVAC contractors can't survive without marketing. It's as simple as that. But marketing doesn't have to be complicated. There are some simple and practical steps you can start with to get more attention, attract new clients, and have appointment slots completely booked for the next month.

The first step in effective marketing is to know what you realistically have the time and expertise to accomplish. I recommend outsourcing the very technical and specialized marketing elements like website management, SEO or SEM services, and even email marketing. Trying to manage all the website updates, marketing emails, e-newsletters, client communications, email lists, email marketing analytics, email testing and content creation can be overwhelming for a small business.

I know business owners who feel they can run their website and do all their social media and PR themselves. But when you think about how best you can spend your valuable time, should you be the one optimizing your website pages and scheduling marketing emails or is your time better spent running your business? If your contracting business grows, and you feel you need to bring your marketing in-house, then you can certainly review the costs vs. benefits of doing so.

After you've identified what marketing you might need to pass off to a professional, take a look at what you can do with the team you have. Often, these simple tactics are overlooked:

1. Outbound Marketing Calls. Calling existing customers to give them updates, product news, upcoming service recommendations, or just asking them if they are happy with the service or product that they purchased makes them feel they are valued. What's difficult about outbound calling is that your customer service team might be worried about getting rejections or complaints. The key is writing a script that can be used and adapted easily to make calls less intimidating. Another tip: rather than waiting until it's slow to make outbound calls, do it every day. The more often the team makes outbound calls, the more comfortable they become.

If you're looking for a place to start with marketing, begin an outbound calling program. This marketing tactic is more of an investment in the future of your business. Most clients appreciate the calls, and your team can develop long-lasting relationships that they can build on.

2. Facebook and Instagram. Contractors can get into a habit of pushing products and sales posts on their social platforms — a common mistake. Customers love to see their technicians, or themselves, on social media (with their approval of course). Let technicians post about a happy customer, showing a fun selfie with the client, and you might get a lot more attention for your posts when clients share it with their networks. It's an easy and fun way to connect and build your brand without selling.

3. Videos. 78% of people watch videos online each week, and 55% of those watch every day.¹ Contractors can take advantage of these statistics with short, personal videos featuring technicians educating consumers about everything from water heater safety to changing A/C filters or even explaining the COVID safety protocols your business uses. Also, a video of a finished project with a shot of all the team members at the end can make your business more familiar and approachable. Link to the videos on your social and let customers know you are offering these to help the community.

4. Community involvement. Some brand awareness is more low-key. Being active in your community is a form of marketing without pushing an agenda. Many contractors embrace and support a variety of charities. But a word of caution, don't promote your charitable acts unless you are a serious supporter of an organization. Better yet, involve your team and choose to support a cause you all believe in. So, while posting photos of the team doing charitable acts can be a great marketing tool, be genuine and sincere.

Marketing comes in many forms, and while some tactics can cost a lot, some can be accomplished with very little investment. Try some different marketing tactics this year to boost your contracting business; use more social, post more videos, make more calls to clients, and support local charities. You'll be glad you did. **CB**

¹ <https://socialmediaweek.org/blog/2019/10/2020-video-marketing-and-statistics-what-brands-need-to-know/>



Tammy Vasquez is Senior Head Coach for Business Development Resources. www.bdrco.com/

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Preparing for the HFC Phase Down

Any business operating refrigeration equipment will benefit from HFO refrigerants that will serve as in-field replacements for high GWP HFCs in existing refrigeration systems.

by Brandon Marshall and Andrew Pansulla

The rules governing the use of high global warming potential (GWP) hydrofluorocarbon (HFC) based refrigerants are changing with the recent passing of the American Innovation and Manufacturing Act of 2020 (AIM Act), a rule that promotes the orderly phase down of HFCs over the next 15 years, reducing the consumption and production of HFCs to 15% of the base line period by 2036.

It is important for anyone involved in the cold chain to begin evaluating next generation refrigerant options for both new and retrofit applications. End users in the past have speci-



refrigeration equipment will benefit from HFO refrigerants that will serve as in-field replacements for high GWP HFCs in existing refrigeration systems. This ease of conversion means that you can minimize downtime and extend the usable life of your current equipment, reducing capital expenditures.

As the phase down progresses, the price of high GWP HFC products may increase, and as we approach the latter years of the phase down, availability of products may also be a cause for concern. The good news is that effective solutions exist today to address the phase down and ensure that your systems remain operational.

fied products such as R22, R-404A, R-507, R-134a, R-407A, and R-407C; however, these products, as well as others, will be under scrutiny while the U.S works through the transition to lower GWP next generation refrigerant solutions.

As the phase down progresses, the price of high GWP HFC products may increase, and as we approach the latter years of the phase down, availability of products may also be a cause for concern. The good news is that effective solutions exist today to address the phase down and ensure that your systems remain operational. Hydrofluoroolefins (HFOs)—a family of, high-performance refrigerants—were developed specifically to address the regulatory challenges facing the industry today and tomorrow. Any business operating

of suitable retrofit and new installation solutions. For businesses that depend on refrigerated assets, the long-term availability of HCFC and HFC refrigerants should be a call to action. Future availability of legacy refrigerants is not guaranteed, and businesses should plan now by exploring the cost and benefit profiles

By converting to these next-generation solutions now, you can ensure that your existing equipment will continue to function safely and efficiently well into the future, while reducing the impact to both greenhouse gas emissions and your bottom line. **CB**

See the sidebar on page 27 for product solution information.

Brandon Marshall is North American Marketing Manager, Thermal & Specialized Solutions at Chemours. **Andrew Pansulla** is Technical Service Engineer, Thermal & Specialized Solutions at Chemours.

Refrigerant Product News

Low GWP Refrigerant Solutions

HFO and HFO blends such as Opteon™ XP10 (R-513A) and Opteon™ XP40 (R-449A) were developed to provide cost effective and efficient solutions to comply with local and international standards. The benefits of these refrigerants do not end at compliance as they can also improve energy efficiency and system performance.

Opteon™ XP40 (R-449A) is a nonflammable, low GWP hydrofluorolefin (HFO) blend with a GWP of 1282 (67 percent reduction over R-404A) and is a close performance match to R-404A/507. XP40 offers an ideal solution for retrofit and new systems and is the best choice to replace R-404A/507 for low and medium temperature stationary refrigeration systems. Today, Opteon™ XP40 is being used in a wide variety of different applications including supermarkets, convenience stores, ice rinks, ice makers, and cold storage warehouses.

Opteon™ XP10 (R-513A) is a nonflammable, low GWP HFO blend with a GWP of 573 (56 percent reduction over R-134a). XP10 has an excellent capacity and efficiency match to R-134a and can be used as a suitable replacement for R-134a in many new or retrofit applications including commercial and industrial refrigeration, water chillers, air conditioning, and heat pumps.

	Opton™ XP40 (R-449A)	Opton™ XP10 (R-513A)
Relative capacity (1)	0.99	1.04
Relative efficiency (1)	1.05	0.98
Normal boiling point (2)	-50.2 F	-21.2 F
GWP (AR5)	1282	573
ASHRAE safety class	A1	A1

(1) R-449A capacity/efficiency is relative to R-404A and R-513A capacity/efficiency is relative to R-134a

(2) Normal boiling point is the coldest refrigerant temperature that can be achieved with a positive suction pressure at sea level.

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BY CHARLIE GREER

Systematizing HVAC Operations

The only reason to start a business in the first place is to eventually sell it at a profit. In order to open the sale of your business to the widest potential market, it will have to be attractive to a company or individual from outside of the industry. In fact, my observation has been that organizations from outside of the industry tend to pay the highest dollar in the acquisition of HVAC companies.

In order to make your company attractive to buyers, and for you to be able to completely exit the company, it has to be able to run on its own without you. That means it has to be systematized.

Running even a small HVAC service and replacement company is complicated. Anyone from outside of the industry that thinks it would be easy to run a shop just hasn't thought things through.

Having an Operations Manual will make your company more marketable. Systematizing your company and creating an Operations Manual is not as difficult as it sounds. Owners and managers don't have to do it themselves. Your employees will do it for you.



An increasingly popular way to write manuals and books is to recite your thoughts verbally into a voice recorder, edit the recording, send it off to a service, and pay a very reasonable fee to have it transcribed. A lot of the books you read are written in this manner. That's why the audio version of new books often hits the market before the Kindle or printed version does.

Initially, I'd give employees flexibility on how they start the process. One of the easiest ways to do this is to provide them with a daily planner, either a digital or paper version, and they can mark down what they're doing at various times during the day.

It starts with recruiting the right people

Let potential hires know about your plans to create an Operations Manual during the interview process. Ask them if they've got any writing experience. A lot of people do. Before hiring anyone:

- Show them their workspace, and make sure they feel they'd like working there
- Show them every single piece of paper they'll be required to touch
- Introduce them to the people they'll be working alongside
- Introduce male interviewees to some of the women in the office. If he gives them the creeps, don't hire him.
- Don't hire anyone you wouldn't want as a member of your family.

The end result

Writing down what they're doing throughout their day will make them more accountable. Some people won't like that and will resist. That will be good information to have. People not wanting anyone to know what they're doing throughout the workday is a bad sign.

On the bright side, they'll start using their time more effectively and start getting a lot more done. They'll spot inefficiencies and either make suggestions, or do something about it.

The end result is that you'll have a company that runs like a fine oiled machine with significantly increased value that will be easier to sell at a higher price. **CB**

To make your company attractive to buyers, it has to be able to run on its own without you.

Start with clear job descriptions

Conflicts in the workplace are often a result of people not knowing exactly what is expected of them.

Someone has to be in charge of every single thing your company does, from answering the phone, to ordering supplies, to making bank deposits.

There are a variety of contractors organizations and manuals that have job descriptions, but they rarely are an exact fit for what your employees do. The first step in creating job descriptions that perfectly fit your company is to have your employees write down what they do throughout the day.

Creative writing skills are not a requirement

Initially, the job descriptions will start with a basic list, and as time goes on, employees can start fleshing out the details of each item on the list. Some employees will be better at writing than others. More than likely, someone in your employ will have writing skills and be enthusiastic about writing this manual. I know, because I was one of these employees back in the day.

Charlie Greer has twice been named the HVAC Consultant-of-the-Year, and is a member of the Contracting Business HVAC Hall of Fame. For info on Charlie's products and services, visit www.hvacprofitboosters.com, or call 1-800-963-HVAC (4822). Email your questions about anything or your comments on this column to charlie@charliegreer.com.

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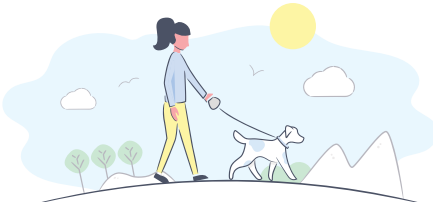
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BY DOMINICK GUARINO

Four Common Business Killers

Only 30% of HVAC contracting startups reportedly make it past the first year, and less than half of those make it past the first five years.

There are many reasons for such high failure rates, including lack of good marketing, growing too fast, growing too slow, overpromising and under-delivering, hiring practices, and on and on.

Below are four of the biggest business-killing mistakes I've witnessed over the years. Some of them I learned from nearly 30 years of running a small business myself.

These mistakes are common, yet they are among the easiest and fastest to remedy. You could literally fix them within 30 days:

1. Not Having A Business Plan

To paraphrase the Cheshire cat in Alice In Wonderland, "If you don't know where you're going, any road will take you there." Whether it's your first or 10th year in business, **a business plan is a must** for so many reasons, not the least of which is to be able to borrow money to help finance your growth.

A business plan is more than projections on a spreadsheet. While numbers are significant, too, your business plan should be a map to where you want your business to go, as opposed to just "seeing what happens."

One of the most critical elements of a good plan is strategy. In other words, what is your unique proposition in a sea of sameness among your competition? Figure that out, and let your other goals and priorities follow.



'Labor is your most precious asset. It's not very easy to get more of quickly.'

2. Poor Financial and Banking Practices

One of the biggest mistakes I've seen contractors make is not setting up separate bank accounts for different business functions. These should include payroll, taxes, warranty, and service reserves.

It's critical to set up a separate payroll account. Even if your payroll provider automatically withdraws your weekly payroll, it's crucial to set up automatic transfers from your operating account to a separate account from which payroll withdrawals are made. Most importantly, you must include ALL payroll taxes.

Payroll taxes are where many companies go sideways. They don't set aside payroll taxes, and when they're due, they don't have the money to pay them. Don't fall into this trap - it's a business killer!

Be sure to also create an account for federal franchise tax, state and local taxes, worker's comp, etc. (depending on your state).

Estimate the taxes you'll owe in each pay period and move that money into a reserve account. That money is no longer yours anyway. Why commingle it with your operating funds?

Finally, set up a warranty and service agreement reserve account and transfer a percentage of installation and service agreement revenues to it each month. If you have excess at the end of the year, you can use it towards bonuses and/or reinvest it in your company instead of borrowing money for growth.

3. Underpricing Your Work

One of the most significant issues that have plagued our industry for decades is not understanding the difference between markup and margin. Many great articles and books cover this subject. The bottom line is markup can be very misleading and is not a good way to achieve the profits you expect. By calculating prices using margin, you will get the right results every time.

Another common mistake is using the same markup and/or margin when estimating labor versus materials cost. Calculate your labor rate at higher gross margins than materials. It's not unreasonable to use a 65-70% gross profit margin on labor.

You can always buy more equipment and materials to meet demand, but labor is your most precious asset and is not easy to get more quickly. It requires an investment in hiring and training people. If you are a High-Performance Contractor who sells labor-intensive work like Air Upgrades and renovations, price those jobs at 70% gross profit margins.

4. Weak Maintenance Agreement Base

Maintenance agreements are the lifeblood of a sustainable, long-term HVAC business. They create recurring revenues, and the work can be done during low-demand seasons. They provide additional revenues from breakdowns during the busy months as well.

Agreements also provide a steady stream of leads year after year. When your customers' equipment is ready for replacement, you will have a strong shot at getting that work.

Finally, service agreements build your company's value for when it's time to sell the business. Companies with thousands of agreements fetch much higher selling prices, often in the millions of dollars.

There is so much more that can be covered on this topic. I hope you benefit from one or more of the tips above by implementing them within the next 30 days - it could mean a huge difference for your company in 2021 and beyond! **CB**

Dominick Guarino is CEO of National Comfort Institute (NCI), (www.nationalcomfortinstitute.com), one of the nation's premier Performance-Based™ training, certification, and membership organization focused on helping contractors grow and become more profitable. His e-mail is domg@ncihvac.com. For more info on Performance-Based Contracting™ go to WhyPBC.com or call NCI at 800/633-7058.



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