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JULY 2022

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DEFINING YOUR

p. 22

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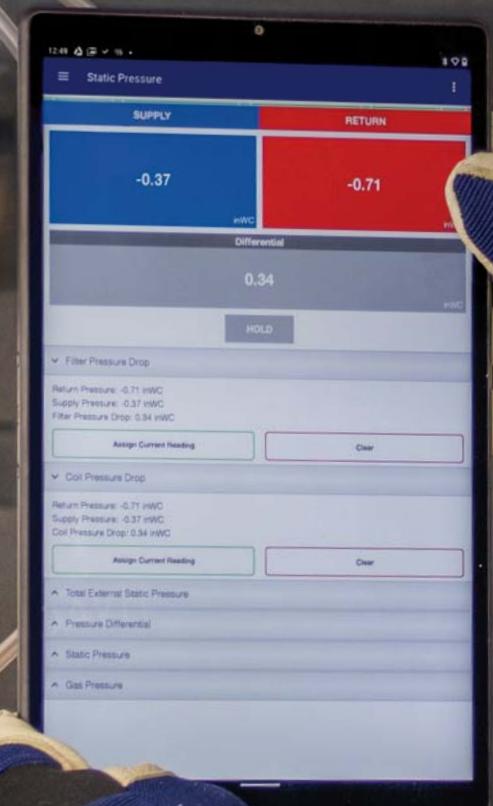
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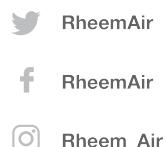
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*Per a 2022 MIAT Residential HVAC Competitive Time Study on base and mid-tier Endeavor Line products and commercially available competitor units of similar product tier. **5-ton models feature a 3/8 in. condenser coil. ***Based on Internal R&D Testing, May 2022. Sound levels are also dependent on proper installation and location of outdoor product.

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R32

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Above All, be Ethical

For more than 40 years, Tim Wentz has worked as a mechanical contractor, educator and heating and cooling engineer, with some of those years devoted to working for a chapter of the American Society of Heating, Refrigerating and Air-conditioning Engineers (ASHRAE), and as an expert witness in court disputes. During a recent address to ASHRAE's Cleveland, Ohio Chapter, Wentz spoke on the relationship between risk and ethics.

"We all face the same problems in terms of ethics," Wentz told the audience of Northeast Ohio commercial contractors gathered for an installment in the ASHRAE Distinguished Lecturer Program. "This includes trying to get paid fairly for the work we do; trying to account for changes, which are inevitable in design and construction; and getting paid in a timely fashion." But whatever happens, Wentz said, contractors must hold fast to their individual codes of ethics.

A Common Problem

Wentz said mechanical contractors are disproportionately burned by unethical practices. "There are many small companies in our industry, and a lot of under-capitalized firms in our industry, and it's an industry that's easy to enter," he said. "For example, if you want to be a contractor in the state of Nebraska, you fill out one form, pay \$25, and voila, you are a contractor. That's not right, but that's the industry we have in many different places."

Wentz explained that contractors, who on occasion take risks, must be good risk managers, to guide the team through various contracts and negotiations. Being successful in handling risk requires integrity, in what is very much a people-based industry. "If your firm is to be successful, it will have to develop long term relationships, and the secret to doing that is by mutually meeting expectations," Wentz said.

He shared the findings of a 2005 Harvard study (Kotter, Heskett) that charted the success of firms that "obsessively" meet the needs of customers. Revenue increased four times faster; job creation increased seven times faster; and owner equity rose 12 times faster than it would have increased without strong commitments to meeting customer needs.

"But what really caught my eye, was that profit performance increased 750 percent in 11 years," in the firms that were obsessed with meeting expectations, Wentz revealed.

Wentz said risk management failures fall into three categories:

1. Those that fail to differentiate between "can" and

"should," which are related to technical issues.

2. Those that follow a minimum standard, which are related to legal issues.
3. Those based on risk avoidance, which is often an ethical issue.

He described three cases for which he served as an expert witness for commercial contractors. They involved a handshake rather than a signed document; non-disclosure of a daily late fee; and designing a louver with an obscene gesture that faced a homeowner who demanded his neighbor's roof be lowered by six inches, to meet the code of a housing association.

The bottom line, Wentz explained, is that contracting firms must create high-performance cultures, by:

- hiring clients and employees that fit their performance culture and ethical culture;
- promoting and supporting strong, ethical decision-making;
- including ethics instruction in employee orientations, mentorships and internships;
- employing non-monetary Key Performance Indicators that model the behavior you're trying to achieve, and set expectations.
- taking a Six Sigma approach: Identify the issues that prevent you from meeting client expectations; summarize key issues; and translate those into specific, measurable requirements.

Silver & Gold

Wentz advised ranking clients as "silver" or "gold" in terms of compatibility. "Gold clients pay on time, they negotiate the work, and result in the most profitable projects," he said. "With 'silver' clients, not all projects are perfect, but most are, and they're good people to work with. Silver clients can be nurtured to become 'gold' clients."

Wentz suggested contractors begin using a "go/no go" process that tells them, "Yes, this is our kind of job. Yes, we can make money on it, and yes, we can nurture the client toward 'gold' status. "This will help to make your firm stronger, and help you avoid some of the 'lead' clients that are out there," he counseled. "Make your go/no go decision unique, apply it prior to the decision to proceed, include an ethical basis for the decision, put it in writing, and apply it to every project," he said. Find the ASHRAE Code of Ethics at bit.ly/ASHRAEethics. **CB**



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COMPILED BY TERRY MCIVER, EDITOR-IN-CHIEF

Columbus, Ohio HVAC Business Begins 'Ride to Decide' Program

Atlas-Butler Heating, Cooling & Plumbing, a home comfort champion in the Columbus, Ohio region for over 100 years, has added a new activity to its role as a community leader: that of helping high school students explore careers in the heating and air conditioning and plumbing trades.

"Ride to Decide"—<https://atlasbutler.com/ridetodecide-2/>—is a new program the company began to design in 2021, through the leadership of Vice President Michael Slepston, to give high school sophomores, junior and seniors an in-the-field look at what an HVAC career offers. While not a new concept among some of the HVAC industry's more proactive service businesses, "Ride to Decide" is especially timely due to the increasing challenge of finding new technicians to replace retirement-age employees.

Atlas-Butler Communications Director Jeanne Hoffman, herself a mother of two children who graduated from high school over the past six years, recalls that five years ago it was commonly thought that everybody had to go to college to find career success. "I think things have drastically changed since that time, and people are starting to see that people are different, kids are different, and there's value in having a skilled trade. The market is not driven in quite the same way as with college-educated positions," she said.

That realization helps with Atlas-Butler's messaging as it visits high schools in search of "Ride to Decide" candidates. They explain that HVAC is a career with baked in success factors: everybody needs heating and cooling, and you learn skills you can take anywhere in the world.

"It was also born out of the idea of introducing the trades to this latest generation that may not know about it," she continued.

The company began its prospecting by reaching out to individual high school guidance counselors, who have in the past been viewed as being laser-focused on college as the end game for the vast majority of students. Hoffman also accepted an opportunity to give a group presentation to guidance counselors in the entire Columbus school district. The response was encouraging.

"They said there is a huge need for this, because they see kids who have some really great skill sets that don't want to attend college. They want to pursue something else, not sit in an office all day, work with their hands, and work in jobs where they feel as though they're helping people."



Atlas-Butler's inaugural 'Ride to Decide' class.

Atlas-Butler

That first outreach brought them in contact with 220 administrators at 70 schools within a 50-mile, seven-county radius.

"Ride to Decide" began on June 6 with six candidates, and will include a one-day, unpaid "job shadowing," ride-along with a technician. Step two will be a paid, three-week internship, one week in each department, HVAC, plumbing.

The first day of shadowing concluded with a meeting with technicians and Chief Operating Officer Kevin Wardman. Students will also be asked to complete a written evaluation, and technicians will evaluate candidates.

The three-week internship will include basic in-house training at Atlas-Butler's training lab, which includes a newly-added, two-story frame reproduction of a home layout.

If a student decides at the end of the internship that they'd like to pursue an HVAC career, Atlas-Butler will give that decision full visibility, with a "signing day" to welcome those new trainee-employees, complete with media coverage.

"We're going to make a big deal out of it, because anytime a young person figures out what it is they want to do for work and for career, it is a big deal. We celebrate athletes all the time, and honor students. This is something to celebrate, too."

Atlas-Butler is currently seeing its highest employee retention rate in recent years. Fourth-generation CEO and owner Mark Slepston credits this high retention rate to Atlas Butler's long history of navigating tough times, as well as the family-first culture that his team works hard to maintain.

Atlas-Butler Heating, Cooling and Plumbing was the Contracting Business 2007 Residential HVAC Contractor of the Year. —Terry McIver



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HEAT PUMPS

The LYNX 18 Inverter Heat Pump, available under the Ducane, Concord and Allied brands, adapts to a wide range of AHRI-rated system matches and works with most conventional 24V thermostats. QuickLink inverter technology uses intelligent algorithms to deliver a performance fit and fine-tuned temperature control. With ratings up to 18 SEER and 10 HSPF, the unit offers Quiet Shift technology for quiet operation with less than half the sound you typically hear from a 14 SEER single-stage heat pump. It offers five different operating modes: three in cooling operation and two in heating operation, with optional enhanced dehumidification as needed. With energy savings up to 22% annually, it also features Omniduct Total Corrosion Protection technology to extend the unit's life. www.alliedair.com



The AccuComfort Platinum 18 heat pump is part of a new lineup of American Standard communicating equipment featuring American Standard Link, which simplifies the installation, commissioning and remote monitoring of variable-speed HVAC systems. Created to provide technicians with a plug-and-play experience on their own smart

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>EDITOR'S NOTEBOOK: PRODUCTS

The Rheem EcoNet-enabled, inverter-driven Prestige Series variable-speed RP20 heat pump is Energy Star-certified, while offering dependable technology and energy-saving performance. With variable-speed technology, the unit adapts quickly and consistently to heating and cooling needs. It provides cooling efficiencies up to 54% higher and heating efficiencies up to 34% higher than typical heat pump designs. It has up to 20 SEER/14.5 EE and up to 11 HSPF. Additionally, since variable-speed operations outperform single-stage systems and use 70% fewer moving parts for higher efficiency and increased reliability, this heat pump can adjust to meet nonpeak heating and cooling demands, resulting in money-saving performance for each season. bit.ly/3Odqj2B



Trane's Platinum XV20i variable-speed heat pump is part of a new line of equipment featuring Trane Link, a communication technology that simplifies installation, commissioning and remote monitoring of Trane's variable-speed systems. Trane Link assists with installation accuracy of the XV20i through automated configuration, charging

and system testing. The unit has up to 20 SEER and a high-efficiency Heating Seasonal Performance Factor of 10. The TruComfort system gives precise comfort by running at the exact speed needed to keep a home comfortable. This allows the variable-speed compressor, outdoor fan and indoor fan to vary operating speed and Btu as the temperature outside changes, slowing down or speeding up gradually in as little as 1/10 of 1% increments to keep comfort within 1/2-degree of the thermostat setting. www.trane.com/residential/en/products/heat-pumps/xv20i

York's Affinity YZV variable-capacity heat pumps provide efficient performance, worry-free reliability and integrated functionality. The 20 SEER unit matches changing comfort needs for even, consistent comfort and minimal energy use. As Energy Star Most Efficient-qualified models, they can cut energy costs by as much as 50%. To ensure faster installation and service, and maximized service life, units come with built-in Charge Assurance monitoring. QuietDrive sound reduction system reduces sound levels to no more than a typical kitchen dishwasher. Units are compatible with the Johnson



Controls Universal Thermostat Adapter, which allows the heat pump to seamlessly interface with third-party thermostats. bit.ly/YORKcb22

COMMERCIAL GEOTHERMAL

Bosch's FHP WT and WW single and two-stage water-to-water heat pumps offer a clean solution with enhanced features to meet the design requirements for many types of HVAC and industrial applications that require cost-effective heated or chilled water systems. The WT model is available in 2 tons to 6 tons, including a wider range of voltages. It also provides almost limitless options for hydronic systems due to its single two-stage compressor and high operating temperatures. The WW model is available from 10 tons to 35 tons. It includes either one single-stage scroll compressor (sizes 120, 180 and 210) or dual two-stage scroll compressor (sizes 122, 240, 360 and 420) for water-cooled modular, reverse-cycle chiller applications. bit.ly/3QFSed2



Bryant's GZ Evolution can be used with FE/FV fan coils or furnaces with variable-speed blowers. The system continuously monitors indoor and outdoor conditions to provide the best balance of comfort and efficiency. Perfect Humidity technology does not require a call for cooling to initiate dehumidification. Super Dehumidify mode allows the maximum amount of dehumidification, with the minimum amount of overcooling. The Evolution zoning system allows users to set personal comfort levels in up to eight areas of the home. Comes in sizes 2, 3, 4, 5 and 6 tons, with a ground-water COP of 3.8 to 5.2, and EER of 19.2 to 29.1. www.bryant.com/en/us/products/geothermal/gz



The Tranquility High-Efficiency (TZ) Series from ClimateMaster offers two-stage operation with a Copeland UltraTech two-stage scroll compressor. Available in sizes 024 (2-ton, 7.0 kW) through 060 (5 tons, 17.6 kW). Features include galvanized steel construction, corrosion-resistant polymer drain pan, sound-absorbing glass fiber insulation, double-isolation compressor mounting for quiet operation, insulated divider and separate compressor/air handler compartments, field-convertible discharge air arrangement for horizontal units and variable-speed ECM fan motor. www.climatemaster.com/3142.html



This 3-in-1 system from GeoStar provides ducted heating and cooling as well as hot water for radiant floor applications. The Cypress Series includes a variable-speed ECM blower motor that allows the unit to provide even comfort, quiet operation and energy savings. Units feature aluminum air coils for durability and extended system life. Only available in dual capacity, the units include Scroll UltraTech compressors mounted on double-isolation plates for extra-quiet operation. Microprocessor controls sequence components to provide ultimate performance. Onboard diagnostics allow for easy service. Controls communicate with thermostat to display service messages. Electronic overflow protection is included to eliminate the possibility of condensate flooding. www.geostar-geo.com/products

Modine's SchoolMate water/ground-source heat pump maximizes energy efficiency, saving schools thousands



of dollars annually. It combines the natural heat sink of the earth with the patented CF coil, and requires less HVAC equipment space and reduces operating costs. Available in 24, 30, 36, 42, 48 and 60 nominal MBH. Patented two-row microchannel technology maximizes efficiency and performance. Advanced blower and compressor technologies decrease sound and power output. Modulating EC fan motors allow variable speeds for fluctuating load conditions and energy savings. DX, Hot Gas Reheat and Hot Water/Electric Heat coils fit inside a standard unit. bit.ly/3y6kBKm



Samsung's DVM S Water geothermal heat pump was developed for both commercial and residential applications. Good for retrofit or new construction projects

using closed-loop water systems or geothermal sources, for their heating and cooling needs. Compact design allows for easy installation and makes it a perfect



solution for buildings where space is limited. System capacities from 3 tons to 50 tons. the unit offers long pipe lengths and a wide variety of indoor unit options. www.samsunghvac.com/light-commercial-commercial/dvm-s-water

The WaterFurnace Versatec 700 water-source heat pump features variable-capacity compressors; each model has a



25 % to 100% capacity range or 4:1 turn-down with load matching. By using variable-capacity compression and balanced port bidirectional electronic expansion valves, the unit provides temperature control and active dehumidification. The dedicated 460V, five-speed ECM doesn't require the use of a neutral, which reduces labor costs in retrofit applications. The unit features variable-speed fan options to allow for low energy consumption, enhanced air delivery and precise temperature control. Has all-aluminum rifled tube-and-fin air coils. bit.ly/3tVCXvI

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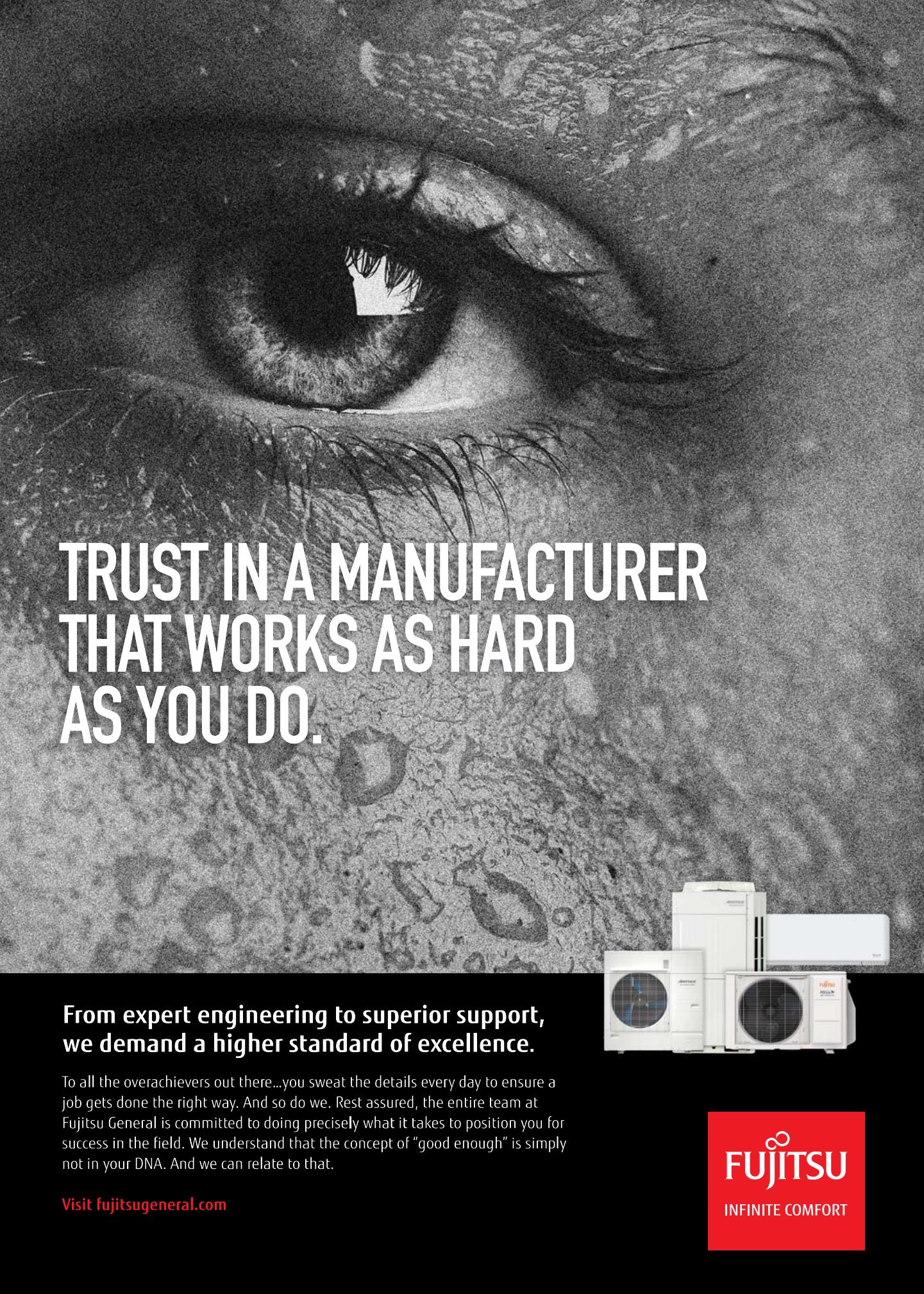


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Evergreen Telemetry manufactures the unique Wrist Reporter™, a 6-in-1 meter for Air & Water Pressure / Velocity / Flow / Temperature / Humidity. The patented Wrist Reporter is used for air balancing, commissioning, and troubleshooting in commercial buildings, clean-rooms, and residences. The Wrist Reporter displays real-time results from as many as 10 wireless sensors at 10 different locations. Applications include duct traverse, flow damper setting, ventilation calculations, duct pressures, room-to-room pressure hierarchies, coil performance testing, hood certification, and wireless data logging. This high-productivity instrument makes TAB and Cx faster, easier and safer.

evergreentelemetry.com



The 1587 FC insulation multimeter from Fluke allows technicians to connect the insulation tester and monitor test measurements remotely. The tool is Fluke Connect-enabled; just download the free Fluke Connect Measurements app to your smartphone. Techs can prove the job is done right by quickly seeing and sharing insulation resistance test results wirelessly with a smartphone.

They can quickly find problems by saving and comparing measurements over time on a wireless device. Many more features included. fluke.com



Two of Fieldpiece's most recognized patents are its Rapid Rail® Sensor Technology and the RunQuick® Oil Change System.. Rapid Rail Sensor technology delivers accurate results unaffected by ambient air, so you can say goodbye to false readings. With two sensors, quickly seeing and sharing insulation resistance test results wirelessly with a smartphone, techs can quickly find problems by saving and comparing measurements over time on a wireless device. Allows for PI/DAR-timed ratio tests with TrendIt graphs to identify moisture and contaminated insulation problems faster. While the pump is running, the RunQuick system allows techs to replace oil in under 20 seconds without losing vacuum. fieldpiece.com



The palm-sized Sauermann Si-HH3 thermo-hygrometer easily measures relative humidity and temperature. Features include backlit LCD screen, magnetic backing for easy fixing, calculated values on free mobile app, 250-hour battery life, two-line display and built-in probe. It measures in various units: °F, °C, % RH, °C Tw, °Ctd, °Ftd, °F Tw, g/m³, g/kg, kj/kg. bit.ly/3tVTjnp



UEI's COA2 wireless carbon monoxide detector with self-test can be used as a stand-alone detector or connected to a smart device. Features include iOS and Android compatibility, CO sensor self-test, audible alert, three-color warning alert, max value capture, hold function, auto zero upon power on, back light, low-battery indicator, auto power off, and a belt clip. Measures CO detection from 0 to 999 ppm and resolution of 1 ppm. www.ueitest.com/ECommerce/product/coa2

Yellow Jacket's Series 41 test and charge manifolds are made of solid brass for durability, full porting to maximize capacity, full-size metal valve handles for easy operation, and hose anchors forged into back



of body at 45 degrees. Flutterless technology means surge protector and silicone-dampened movement helps minimize needle pulsation for easier, more accurate readings. Sliding double O-ring pistons reduce wear. Easy-to-read 2 1/2-in. steel case gauges with 3-2-3% accuracy. Most manifolds include color-coded Yellow Jacket charging hoses. bit.ly/3beM8QO

Fujitsu General Announces Premier Program® Strategic Partnership

Fujitsu General America, Inc. has partnered with Service 1st Financial, LLC to offer the Premier Program® to its contractor partners. This partnership allows Fujitsu contractors to provide homeowners with a Home Comfort-as-a-Service leasing option for their residential heating and cooling needs.

The Premier Program is a worry-free service for homeowners to replace and upgrade their heating and cooling equipment for a low monthly payment, while eliminating the common pain points associated with owning, maintaining, and repairing such systems.

Delivered through a comprehensive, easy-to-use platform, the Premier Program is supported by industry-leading, on-site sales training. Contractors that utilize the Premier Program experience improved financial performance from higher close rates, increased average tickets, and profitable recurring revenue. Each Premier Program installation also features a long-term maintenance agreement that improves customer retention, secures annual cross-sell opportunities, and places the installing contractor first-in-line for the next replacement sale.

Homeowners will enjoy the most advanced home comfort systems and complete peace-of-mind knowing the installation was completed by a highly qualified and approved Premier Program contractor. Each Premier Program installation includes 24/7 priority scheduling, annual preventative maintenance, air filter replacements and covered emergency repairs while eliminating trip, diagnostic, and overtime fees.

This partnership promotes the shared sustainability goals of Fujitsu and Service 1st. "The home comfort industry is a significant contributor to carbon emissions worldwide. It's our responsibility to encourage consumers to make planet-friendly purchasing decisions," said Anuj Khanna, Founder & CEO of Service 1st. "Replacing old home comfort systems earlier, making high efficiency products more financially accessible, and ensuring annual maintenance is performed are key contributors to reducing the industry's carbon footprint. Together, Fujitsu contractors and the Premier Program can deliver on these critically important goals."

Adding the Premier Program to a comfort offering is fast and simple, Fujitsu says. For more information, visit www.worryfreehomecomfort.com/fujitsu.

APPOINTMENTS

June 7—NIBCO, Inc. has promoted Dawn Bloch to vice president, customer engagement. Bloch will oversee the marketing communications department and continue to manage business development and customer service. She will report to Ashley Martin, NIBCO executive vice president.

Bloch joined NIBCO in 2000 as a customer service representative. She held several positions of increasing responsibility, including technical specialist, radiant heating advisor, radiant heat technical coordinator, customer service supervisor, customer service manager, director of retail sales, manager of HR services and director of business development and customer service.

Bloch was named to the Supply House Times "20 Women in Industry" in March 2017.

June 14—Steven Lakin has joined Danfoss as its new director of public and industry affairs. Lakin is described as an accomplished government relations and public affairs professional with extensive experience working across multiple industries, with



Bloch
NIBCO

industry associations, and with policy makers at the state and federal level. He started with Danfoss on May 16.

"I am excited to join Danfoss and bring my experience in both the public and private sector," said Lakin. "Danfoss is an industry leader in energy efficiency and sustainable technologies, and I look forward to working with key industry and government stakeholders at this critical junction, where innovations in climate and sustainable solutions are gaining momentum in our national conversation." Lakin replaces John Sheff.

May 16—BuildOps appointed Glen West to serve as BuildOps Head of Growth, to lead strategic integrations and partnerships.

"Glen's more than 30 years of experience adds tremendous value to BuildOps," said Alok Chanani, CEO of BuildOps. "His insights and opinions are already contributing to the whole company, and his critical analysis is enriching our 2022 strategy," Chanani said. BuildOps welcomes Glen's leadership experience and expertise in construction technology and accounting to drive its strategic partnership strategy.



Lakin
Danfoss



West
BuildOps





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**BIG ASS
FANS**

Talk it Out

by Joe Dysart



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Facing intense competitions for employees, contractors are finding they can hang onto valuable employees longer by engaging in 'stay interviews.' Recruiting experts say these interviews ensure current employees feel valued—while uncovering beneath-the-radar problems that could lead to abrupt departures. The stay interview is not a new concept, but it is an idea that will benefit many of those hearing about it here for the first time.

Says Len Monfredo, principal, E.M. Duggan: "Some of our best successes have come from the ideas of the people in the trenches. We routinely check in with employees and encourage them to share their experiences and ideas."

Knowing that a staff will often face challenges or be in the middle of individual situations, Ronald C. Kerins, Jr., president of Greyhawk, says the construction consultant company will frequently cut to the chase regarding employee discussions.

It's much better to develop the art of conducting stay interviews than to become the master of the exit interview.

"Greyhawk has always advocated for senior managers maintaining regular communication with staff and not waiting on the annual review to solicit feedback on [those situations]. We strive to embrace the 'tough love' they share and be receptive to adjusting based on feedback. It may help us retain valued employees—and ultimately, make the business better," Kerins says.

Essentially, stay interviews say, "We care about what you have to say, we value you as a part of our organization, we are assessing workplace culture and workplace communication and we want to improve for you, as an organization and leaders," says Matthew W. Burr, owner, Burr Consulting, specialists in human resource consulting.

Richard Finnegan, an HR consultant who literally wrote the book on the topic—"The Power of Stay Interviews for Engagement and Retention," says, "Senior managers know that unwanted turnover and disengaged employees drag down profits. Conducting stay interviews is an effective, fast solution that gives a mega-return on investment."

Work Motives Beyond Money

The success of stay interviews dispels the common notion that money—and the pursuit of more of it—is the overwhelming reason why employees disappear from the workplace.

Says Beverly Kaye, co-author "Hello Stay Interviews, Goodbye Talent Loss": "Most employees who leave don't start looking for other opportunities because of dissatisfaction with pay, perks or benefits." Instead, Kaye says, employees are more likely to bolt if one of these key 'reasons to stay is lacking: meaningful, challenging work; a chance to learn and grow; a good boss; and the sense of being a part of a team.

Jon Kinning, chief operating officer and executive vice president of RK Industries, is a big fan of pulse surveys. In addition to stay interviews, "We launch employee engagement surveys to understand all parts of our organization and its impact on employee engagement and fulfillment," Kinning shares.

Lisa Murphy, HR manager, MTech Mechanical, sees similar value in engagement surveys. "If you are invested in keeping your employees – try and dig in on what may cause them to leave, and determine if that is something you can improve or counteract. We have done Top Workplace surveys on a yearly basis—as well as smaller focus groups with team members—to find out what we as an organization should stop, start or continue doing. The feedback is incredibly valuable when you dive in," Murphy says.



Kinning
RKIndustries



Murphy
MTech

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Software to Get Started

Bring in a software package to maximize the efficacy of your stay interviews. **HRSoft** offers a specially designed software package—STAYview—to ensure you get the most from your stay interviews. The software was designed with HR consultant and author Finnegan.

Key elements of the new software solution include:

- Training and guiding managers on conducting Stay Interviews
- Managing the hierarchy of who is to be interviewed by each leader in the organization along with the complete workflow
- Developing a customized Stay Interview for each employer
- Producing analytics to alert managers to employees who are likely to separate from the company

HSD Metrics (<https://hsdmetrics.com/stayright>) offers its own package for managing Stay Interviews—StayRight. The web-based system handles the entire Stay Interview process—including notifying employees, collecting data from interviews and reporting on results. Plus, the 24/7 Web portal displays numerical findings for all data gathered—as well as external benchmarks and commentary.

Add Employee Pulse Surveys for Additional Insight

Contractor HR departments can also augment stay interviews with software that enables them to stay abreast of overall employee morale and engagement.

Software vendors that offer these employee pulse interviews include:

- Reward Gateway (<https://www.rewardgateway.com/>)
- Kazoo (<https://www.kazoohr.com/>)
- Workvivo (<https://www.workvivo.com/>)
- Waggle (<https://www.waggl.com/>)
- CultureIQ (<https://cultureiq.com/>)
- Peakon (<https://peakon.com/>)

Use Standardized Scripts

Burr recommends standardizing the questions contractors use in stay interviews. This will enable managers to analyze information and insights on an employee-by-employee basis. Plus, the collation and analysis of data from these standardized interviews—using either off-the-shelf Stay Interview software or a custom solution—may enable you to develop business-wide policies based on concerns widely shared by your employees, he says.

Make sure the employee's manager—and not HR—is the primary interviewer: Given that an employee generally has a day-to-day relationship with a manager—rather than HR—it's critical that the manager conduct the Stay Interview, according to Christopher Mulligan, CEO, TalentKeepers,

Be ready to listen—and hear some things you'd rather not hear. Says Aaron Schuh, president, Recruit4Business: "The employee should talk in the majority of the stay interview, as the interviewer listens and takes notes on key points and concerns. Leave your ego at home and be ready to listen for ways you can improve your business and the loyalty of your employees."

Chat Frequency Matters

Experiment with the frequency of your stay interviews. Wendy D. Glauber, vice president, human resources and general counsel for mechanical contracting firm John W. Danforth, sees great benefit in a series of interviews for new employees:

"We do formal check-ins with new hires at their 30-day, six-month and one-year milestones to help ensure their integration as part of the Danforth team is as seamless as possible, and that they have a comfort level with the company."

Adds RK Industries' Kinning: "Frequent reviews—either quarterly or bi-annually—keep employees engaged, feeling heard—and that their work and effort is being recognized."

Michael Murphy, CEO of Platinum Group, a full-service payroll, human capital management and accounting firm, prefers to stay flexible. "Frequent—possibly quarterly—check-ins can keep things relevant, addressing what might be top-of-mind for employees."

Murphy explains that the exact frequency of interviews will depend on the current climate of the company: "Are there big shifts in direction that might affect people's well-being, or are external forces at play that require pivots—where utilizing each employee's skills to the maximum are essential?"

Be clear that the stay interview will be a safe space for the employee: The very premise of the stay interview—'Tell me what's on your mind—good and bad'—demands real trust from an employee. So, you'll want to be sure employees are convinced they won't be penalized for what they say.

Says Mulligan: "Executed properly, stay interviews provide a safe, structured discussion for team members to share their career growth aspirations, how they prefer to lead, engaged and recognized."

*Be prepared to dig deep: The more granular you're able to get with your Stay Interview, the more likely you'll be able to effect real, productive change.

"Our research has proved that if managers are willing to hang in and drill deeper," they'll be able to find three or four changes for an employee that they're able to make, Kaye says.

Follow Through

Probably the easiest way to sabotage your stay interviews is to nod and smile—and then do nothing. Most employees realize that asking for the moon will get them nowhere. But they'll also be thoroughly disenchanted with you if you ask them to share openly about their concerns—and then ignore them. Says Platinum Group's Murphy: "Letting them know they are heard by the actions you take after the interview is the most powerful thing you can do."

Adds Burr: "If the organization fails to act, employees will never trust the process again." **CB**

Joe Dysart is an Internet speaker and business consultant based in Manhattan. He can be reached by phone at (631) 328-6069.

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DEFINING & APPLYING



How much more or less is something worth because YOUR BRAND is the one providing it?

by Tom Casey Jr. Part 3 in a series.

Brand equity is a fancy marketing term that people trying to sell you marketing sprinkle throughout their pitch, but exactly what does it mean? Exactly what are they talking about? It's actually quite simple. Brand equity is the difference between the value of a product or service WITH your brand versus the same or similar product or service WITHOUT your brand. In other words, how much more or less is something worth because YOUR BRAND is the one providing it?

Higher brand equity translates into better conversions across the board, including online and offline. Higher brand equity means higher price points. Higher brand equity drives market share growth. The really cool thing about brand equity is higher brand equity can actually drive even higher brand equity over time.

The elements of basic brand equity are:

- Loyalty, aka REPEAT CLIENTS
- Awareness, aka RECOGNIZABILITY
- Quality, aka REPUTATION.

Loyalty is impacted by how well your client experiences line up with your marketing and the expectations you set. Under promising and over delivering makes loyalty increase. Standing for something and operating with integrity increases loyalty too.

Awareness is affected by how prominent your brand is in your prospects' mind. Any marketing can increase awareness, but great marketing can take it to a whole other level. Being omnipresent in different verticals, having a balanced marketing portfolio, and making sure your brand messaging, graphics, imagery, etc all align with what your brand stands for

all increases awareness.

Quality has a lot to do with how memorable you are, in a positive way. Having a brand personality that syncs with your target prospects immediately results in a higher quality experience for everyone, including the client, your techs, and your company. Remember that quality means different things to different people, so it's more than just what brand,

In this battle for memorability,
only those who market
regularly enough will remain
top-of-mind enough to win.

processes, pricing, and other elements and more to do with how those things meet or exceed client expectations. That's why there are low price leaders with a satisfied customers list that coexist in the same markets as high price leaders with equally satisfied customers. When it comes to "quality", everyone may not be your ideal prospect.

In theory, everyone in your market is competing to be the contractor of choice. In this battle for memorability, only those who market regularly enough will remain top-of-mind enough to win. If you stop marketing, someone else will take your place. You can never stop marketing! Prospects need constant reminding. This is likely to get exponentially more important as we navigate a potential economic recession. Companies that cut marketing as a strategy to get leaner and meaner, open the door for companies like yours to expand by increasing while they're cutting.

There is a trick to building brand equity with marketing. Your marketing only works when it's so easy a caveman could "get it". Don't make prospects think too hard, or risk losing them quickly... astonishingly quickly!

Your prospects want "nice and easy" ... like 3rd grade simple. The more complicated your message... the more your prospect has to think... the more dots for them to connect... the more likely it is that you'll lose them.

News Flash – Prospects don't do what YOU want. Prospects do what THEY want. Your goal of any marketing is to increase brand equity by influencing the prospects' perception of your brand. Are you cheap? Are you overpriced? Are you worth every damn penny? Are you in demand? Are you cutting edge? Are you easy to do business with?

Forget what you actually have to offer, like units, equipment, tune-ups, duct cleaning, or any other trade jargon. Instead, what do you want your prospect to perceive you have to offer? Same day service? Next day installs? Free dispatch? Nights and weekends no extra charge? No maintenance fees for 5-years?

Your prospects don't "think," they REACT! "Thinkers" don't act. "Thinkers" don't buy. They "think about it" or they "sleep on it." Everyone and every decision is motivated by emotions. Prospects decide emotionally, then justify those decisions logically. How will your prospect react emotionally to what you offer? How emotional can they really get for a preseason tune-up? Or, would a "Worry-Free No-Breakdown Summer" be more impactful? Can they get emotional over waiving your dispatch fee with work performed, or would "Guaranteed Same Day Service" be more impactful to the person calling from a sweltering house?

All of your marketing messages have four potential reactions or outcomes:

1. Something is BOUGHT: someone books a call.
2. Information is SOUGHT: someone calls with questions.
3. Past experience creates a THOUGHT: someone remembers something positive or negative about what happened the last time they were in that situation.
4. Your message is FORGOTTEN: they couldn't care less.

How do you maximize your marketing messages? Default to the KISS method, as in "keep it super simple."

- Simple Message—an easy to read, easy to understand headline, so even a caveman gets it
- Raise an Emotion—use of funny, inspiring, attention getting, lifestyle, or controversial imagery, so even a caveman pauses for a second
- Ask for Something—a "no-brainer" offer, that anybody can understand.

A confused mind always says, "No!" In the case of brand equity, make it easy for your prospects to pick you by standing for something that resonates with them, being omnipresent where your prospects are with a balanced marketing portfolio, and delivering amazing brand experiences that align with your prospects' expectations. Leverage your marketing to build your brand equity with simple messages that speak emotionally to your prospect, and inspires them to take action. **CB**

Tom Casey, Jr. is chief quality officer at Griffin Service, St. Johns, Fla. He was previously the CEO of Casey's Climate Partners, an industry leader for decades. Both companies have won ContractingBusiness Quality Home Comfort Awards, for excellence in efficient home HVAC installations. He can be reached at tom@comfortjedi.com / 518-732-JEDI.

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Eliminate Blind Spots to Improve Business

How do we earn the trust of the client so we can truly help them with all their comfort needs?

by Mike Treas

Do you have blind spots in your business? For example, techs who might not always be the most courteous? Even though you train them on what to say, how to say it and to always smile, do you really know what happens once they drive out of the lot? Do they take time to listen to the homeowner? Do they ask engaging questions and offer solutions that will help the family be comfortable, healthy and save money? Are they patient, understanding and kind?

Compelling Customers to Buy

Do your field teammates compel homeowners to buy something, anything? Find out what someone wants and needs, educate them about how they can get that result and they will buy. Your customers might buy once, but do they regret that purchase later? Who will they call next time?

When a homeowner needs their cooling restored, they are focused on getting the cooling restored. They are worried about the cost. They need a nice, kind, smiling professional who shows confidence and skill and will not take advantage of them. When a technician turns into a salesman it can make the client mistrust them. However, we are

not working in a non-profit industry. How do we earn the trust of the client so we can truly help them with all their comfort needs?

When a technician has earned the trust of a client and the client believes the tech has their best interest in mind, they can relax and listen to the tech. Earning the client's trust starts with the first impression. The first impression starts as soon as the tech pulls up to the curb. They will watch from inside to get a look at the tech as they walk up to the house. A pro knows this and will walk with purpose, show confidence in their stature and smile. A smile can make all the difference.

Get a Dialogue Going

Get the customer talking. I ask questions about what they do and what they like to do. Ask them to come with you to the system, because you will have additional questions about their comfort and how the system has been working. Ask questions about their comfort, health and cost to heat and cool their home. Ask, "If I could help you with that, would you want me to?" Educate them on how comfort systems work, explaining single stage, two-stage and multi-stage systems and ask, "Which one do you feel would make you more comfortable?" Or,

"Which one do you think would lower your utility bills?" Explain how filtration works or how ultraviolet lamps work and ask, "Which one do you think will help Andrew breath better?"

Homeowners don't know that they can be comfortable in every room in their home. Most families have someone who has allergies or some type of respiratory issue. And they are not aware that their home may be worsening those symptoms. Many people are concerned with contracting a virus from other family members or even a visitor. Some people want the latest technology controlling their system from their phone. We can help with all these things.

Take a Ride

Ride with your techs on occasion. Train them to give a great first impression and earn trust. Give them questions to ask that will result in opportunities to educate clients about how they can make changes in their comfort, health and cost savings. Eliminate the blind spots and watch your company win the race. **CB**

Mike Treas is an experienced contractor who also serves on the faculty of EGIA Contractor University. Visit MyContractorUniversity.com/CBS for 30 days of free training materials.

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Aligning Territory Sales Strategies

Sales strategies established along territories ensure growth and increase market share.

by Candy Cunningham

For HVAC distributors, maximizing results in a given territory is essential to long-term viability. Those who want to thrive, not just survive, must develop and implement sales strategies to ensure growth and increase market share.

There are three primary ways to grow an HVAC distribution business within a territory:

- Help contractor customers expand their business so they will buy more from you.
- Encourage existing contractor customers to start buying products from you that they either haven't been purchasing at all or have been purchasing from competitors.
- Add new customers.

What level of sales increase do teams need? What percentage increase is needed from each customer? How many new customers do they need to add, depending on sales volume?

Building a business strategy based on those growth principles—and tying foundational management practices to sales processes to drive growth—are key to a distributor's success in 2022.

Relationships Drive Sales and Market Share Growth

Helping contractor customers grow business and earn a greater share of their wallet go hand in hand. Both depend on a relationship-based approach to business rather than a transaction-based approach.

For distributors, that means having a deep understanding of your contractor customers' business and the challenges they face. What are their pain points? What's preventing growth? What's holding them back from buying more products from you? Answer those questions and you're in a position to deliver true value in the form of growth strategies, business training to support growth, and expert insights on how your products and initiatives can drive profitability.

When it comes to delivering value directly to customers, sales associates

are the boots on the ground for every distributor. No matter how much skill or experience sales associates have, they can't succeed without support. In addition to offering ongoing training and other professional development opportunities, managers can further empower sales teams with strategies to help them make the most of their time (and respect your customers' time, too).

- Formalize daily activities with strategic schedule planning so sales associates know who they will visit and when.
- Have a plan for each customer meeting and set clear achievement goals.
- Role play in advance on how to complete a sales call.
- Send an agenda before a meeting. This allows a customer to prepare, demonstrates the associate's attention to detail, and communicates in advance the purpose and intended result of the meeting.
- Capture commitments made to contractor customers during a meeting and follow up with a sense of urgency. Frequent status updates for customers and supervisors help drive urgency and close sales.

Finally, make sure you have a plan for adding new customers from within the territory. Are you covered both geographically and in all market segments? Add new customers strategically and communicate in advance with existing customers who may be impacted or have any concerns. Create a profile of the types of customers who succeed with your company and build a "value story" you can share with all prospective customers to highlight everything you provide.

Support Sales Teams for Success

Some of these approaches may be new to outside sales associates. It's critical they're educated and trained on the actions as well as the intended results. When the process and results are connected for sales teams, they're equipped to build relationships to efficiently support sales and market share growth.

What steps can distributors take to support the sales team success?

- Define the team's goals. What level of sales increase do they need? What percentage increase is needed from each customer? How many new customers do they need to add, depending on sales volume?

- Regularly review progress. Talk with them frequently, not just at the end of a sales quarter or during an annual review. Discuss the challenges and help them adjust to stay on track.
- Coach to success, then find and celebrate the wins. When challenges arise, focus on identifying solutions to help sales teams grow.

Distributors depend on the success of their sales teams. By supporting sales teams and strategically aligning company processes and practices with sales results, distributors empower associates to build customer relationships to drive growth in sales and market share. **CB**



Candy Cunningham, BDR's client relationship specialist, is the primary contact for the company's distribution training sales channel and provides ongoing resources

to BDR's distribution partners to help them host successful classes that drive their business forward. Candy has a deep background in distribution sales and territory management, with extensive experience in marketing, job quoting, annual dealer meetings, dealer recruitment and overall territory sales support. bdrco.com

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CASE STUDY: Raley's Supermarket Converts to Low GWP Refrigerant

Operational performance and energy reduction are definite positives.

Raley's Supermarkets is a family owned chain that takes pride in its leadership and commitment to environmental sustainability. In addition to sustainability projects like reducing energy usage from lighting, the installation of solar panels, and generating natural gas from store waste, Raley's is also leading the industry in its transition to non-ozone depleting, low global warming potential (GWP) refrigerants. When Raley's corporate engineering and energy groups considered the future of commercial refrigeration in light of

Overview of System and Conversion

The refrigeration system in Raley's Santa Rosa store provides both low temperature (frozen food) and medium temperature (produce, meat, dairy) refrigeration, as well as air conditioning and hot water for the store. The system was originally designed to operate using R-404A refrigerant. The Santa Rosa conversion project was completed overnight in October 2014 by PMC Mechanical, Inc., following retrofit guidelines provided by Chemours. Because the refrigeration system was already operating on POE oil, no lubricant change was required. Additionally, no change out of seals or gaskets was needed. After startup on XP40, the only major work required was to check and adjust the superheat on the individual TXVs, due to the lower mass flow rate of XP40 vs. R-404A. The existing valves were turned down to obtain the proper superheat and

Operational & Energy Performance:

This table provides operational data measured at similar ambient conditions for the system prior to, as well as at 1 week and 6 months, post-conversion to Opteon™ XP40. XP40 is shown to be operating as expected and consistently over time frame.

	Daily Average Value		
	Pre-Retrofit October 2014 R-404A	1 Week Post-Retrofit Nov. 2014 XP40 (R-449A)	6 Months Post-Retrofit April 2015 XP40 (R-449A)
Condensing Pressure, barg (psig)	11.389 (167.3)	11.300 (166)	11.368 (167)
Discharge Temperature, °C (°F)	60.2 (140.3)	72.1 (161.8)	74.4 (165.9)
Ambient Temperature, °C (°F)	19.7 (67.4)	17.6 (63.6)	16.7 (62)
Medium Temperature Suction Pressure, barg (psig)	3.662 (53.8)	3.336 (49)	3.322 (48.8)
Medium Temperature Suction Temperature, °C (° F)	12.2 (54)	17.2 (62.9)	19.2 (66.5)
Low Temperature Suction Pressure, barg (psig)	1.103 (16.2)	0.837 (12.3)	0.837 (12.3)

Source: The Chemours Co.

new regulations and their own sustainability goals, they consulted with technical experts from long-time refrigerant producer Chemours (formerly DuPont Performance Chemicals) for the latest developments and low GWP options.

After the teams met, Raley's quickly identified an initial test store in Santa Rosa, CA for conversion to the newest low GWP refrigerant from Chemours, Opteon™ XP40 (R-449A). XP40 is a hydrofluoroolefin (HFO) blend that has zero ozone depletion potential (ODP) and a >65% reduction in GWP over the incumbent R-404A refrigerant. The team's project goals were to understand the retrofit details, validate operational performance, and measure energy performance of the new HFO refrigerant. Opteon™ XP40 Refrigerant Opteon™ XP40 is a nonflammable, low GWP refrigerant based on new HFO technology that offers excellent performance along with improved environmental and energy properties.

prevent liquid flood back. The system cases and walk-ins quickly pulled down to temperature and have operated reliably since the conversion.

Operational and Energy Performance

The table below provides operational data measured at similar ambient conditions for the system prior to, as well as at 1 week and 6 months, post-conversion to Opteon™ XP40. XP40 is shown to be operating as expected and consistently over this time frame.

Energy performance of the system has also been monitored since the conversion. Reduced energy usage on the order of 8-9% has been observed.

Edited for space. **Find the entire case study at <https://contractingbusiness.com/21244233>.**

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Should You Expand to an Additional Location?

You might be thinking about expanding your HVAC business into an additional territory. Here are some points to consider, so you make the right move at the right time.

Where to Go

- Go to an area that's growing in population, not decreasing. Look into the demographics in the area. Unless you like dealing with landlords, stay away from areas that are primarily rental properties. Another factor to consider is whether or not the area is primarily year-round residents. The Census Bureau has a lot of that information online, totally free of charge. (<https://www.census.gov>)
- If you're in residential HVAC, go to an area with homes that are about 10-20 years old. If your techs are well-trained and understand the value of replacing equipment, there should be no shortage of replacement opportunities. When an area has a growing population, a lot of people decide to sell their homes, so they have to fix them up. Those home improvements often include replacing the HVAC. Also, when people buy new homes, replacing the HVAC is often a priority.



dealing with established businesses, so your being new to the area would be a reason for me not to call you. It's better to just stress all the reasons to buy from you. Advertise maintenance, the importance of regular maintenance and all the good reasons to choose your company to do it.

If the potential new location is near where one or more of your technicians resides, you can get a good feel for the area by doing some advertising for seasonal tune-ups.

Market Study

Thirty years ago I went to a shop with four technicians, in an area of about 250,000 people. The contractor expressed some concern, or should I say disappointment, that I hadn't done any kind of a market study to show that his market area could support him with all the other contractors in the area. My answer was that I wasn't concerned about whether or not the area could support all the contractors and service techs doing business there. My only concern was whether or not an area of 250,000 people could support four techs. The answer was a resounding yes. I then made the point that all we had to do was be better at everything than everyone else and he had nothing to worry about. The company is still in business, with over 30 techs and installers, and is the largest company in the area.

Expand into an area where there are no quality contractors. We had three small towns that were roughly an hour away from us. We were almost always guaranteed to be successful when we ran calls in these areas. People told me that by the time they called us, they'd already tried the cheaper local contractor, and pretty much expected a first class company like ours to be more expensive and were looking forward to getting the job done right.

An Alternative:

Can you get away with an online presence serving as an additional location?

For instance, our advertising and business cards showed us having multiple locations, but we actually only had three fully staffed locations. The rest of them were storage units. We did that in areas where a few technicians lived. We had a warehouse person that visited each shop and storage unit and replenished stock. **CB**

Charlie Greer is in the HVAC Hall of Fame, has been voted the "HVAC Consultant of the Year" and the "Top HVAC Industry Sales Trainer." For information on Charlie's audio/video/or Zoom sales training, call 1-800-963-HVAC (4822), or go to www.hvacprofitboosters.com. Email your comments or questions about this column or HVAC sales to charlie@charliegreer.com.

Don't advertise that you're new to the area, just the reasons to buy from you.

- Go someplace where building permits are on the rise.
- Go to an area where some large corporation is expanding into, so you know there will be a population growth in that area, and that the people who move there will have jobs.
- Go where the money is. There are exceptions, but my extensive travels have shown me that the contractors that have it the easiest are in the wealthier areas. If you're in a poor area and get an opportunity to acquire or open a shop in a wealthier area, do it.
- Capital cities tend to do well.

According to a market researcher I know personally, the people in this country who have the money to spend on their homes are older people. Don't waste too much effort on Millennials.

If You Do Expand

Don't advertise to people that you're new to the area. No one is going to call you because you're new to the area. I prefer

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Be a Business Prepper

Preppers are people who think about and prepare for a disaster, be it natural in origin or caused by man.

While some consider them paranoid nut jobs, preppers consider their efforts to simply be a form of insurance.

If we are not already in a recession, we will be in one soon. The signs are everywhere. Stocks are in a bear market. Inflation is out of control and the Federal Reserve is indicating steep rate hikes are coming. The Fed will try to massage it for the proverbial “soft landing.” It’s better to prepare for hard shock and be overprepared if it does not come.

Given the way the service and replacement side of the industry sailed through COVID in 2020 and 2021, plus the record profits many contractors are enjoying in 2022, it may seem like the industry is bulletproof. It’s not. A recession, especially a steep one, is hard on everyone and devastating to those who make the wrong decisions.

1. Adopt an Aggressive Mindset

An economic downturn does not need to affect your business. Let it affect your competitors. Decide now that when there is a recession you are going to refuse to participate. It sounds simple, but is not, of course. It takes a mindset of steel and a determination to fight through the challenges. You will be helped by the fact that most of your competitors will panic, pull back, and seem to disappear from the market. Some, in fact, will disappear.

2. Identify Your Business Sensitivity

Think of the worst single thing that could happen to your business. It could be the loss of a major account, a rainmaking salesperson or technician, or a simple crash in demand. While you would work hard to overcome the loss, estimate the cost in gross profit if you took no action to replace the lost business. If you are still profitable, you can sleep easier. If you are not profitable, decide in advance what actions you can take to at least break even should the worst happen. Then, work to build up other sources of revenue to give your business more revenue diversity.

3. Hoard Cash Today

Today, while the weather and sales are hot and the margins are high, keep a little more back than normal. Make the important investments, but cut back on the frivolous, personally and in business. Review your vendor list and look for lower priced substitutes. When the recession is in full swing, having a little extra cash on hand will comfort you. Remember, cash is not cold and hard. It is warm and soft and you can cuddle it.



When the recession is in full swing, having a little extra cash on hand will comfort you.

4. Exercise Your Line of Credit

If you do not already have one, take out a line of credit with a local bank, one where you can establish a human relationship and build trust. Periodically exercise the line of credit and pay it back in a month or two, even if it costs you a few points of interest. Like your muscles, your line of credit will atrophy if you fail to exercise it.

5. Keep Calm and Carry On

When things eventually go bad, your team will know. If you show a little fear, they will feel terror. You need the entire team to pull together and to focus on business challenges. If terrorized, they will be worrying about their jobs, depressed, and unmotivated. No matter what you feel inside, you should appear unruffled, positive, and cheerful on the outside without being Pollyannish. Admit there are challenges, but show confidence that you’ll beat them if everyone pulls together.

6. When Sales Slow, Market More

When it gets harder to find a customer, you should pick up your efforts, though most contractors do the opposite. This is good for you. Put forth more effort, more marketing, and more advertising to pick up their customers. A sharp downturn is a contraction of 3% to 8%. Market enough to make up 3% to 8%. It’s doable, so do it. This is why you hoarded cash.

7. Look For Bargains

In a recession there are bargains to be had. Some contractors will close up shop. Be prepared to purchase companies with good customer lists. If you lack the cash or financing for an outright purchase, get the seller to finance or pay a commission on sales to the seller’s customer base over the next few years. **CB**

Matt Michel is President of Service Nation and a member of the Contracting Business Hall of Fame. You can reach him at mmichel@servicenation.com or 214.995.8889.



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