

## The "HVAC" Business Doctor's One Day Workshops

**A. Financial Management I:** this work shop covers calculation of Direct Labor Costs and Vehicle Costs, Pricing all Installations knowing Net Profit Dollars for each Job, Break-even Point measured in Gross Profit Dollars, calculation and allocation Overhead Expenses to the firm's capacity to achieve desired Net Profits. I also cover pricing Demand Service Rates; reading and understanding the firm's Balance Sheet and Income Statement, other Financial Management Reports. **This is an actual working Financial Management and Net Profit Pricing System and includes Pricing Spreads Sheet Software!** The audience includes owners, managers, bookkeepers, and possibly support staff. This workshop requires one six to seven-hour session. I feel that the methods I instruct are so valuable that this workshop should be offered at any time. Suggested dates: Any time possible!

**B. Financial Management II:** this workshop focuses on the financial management including: Conducting Monthly Financial Reviews, Cash Flow Management, Collections & Credit Policies and Procedures, your Balance Sheet, and how to prepare a Budget, **Software included.** The audience includes owners, managers, bookkeepers, and possibly other support staff. This workshop requires one six to seven-hour session. This work shop should be conducted approximately two to three months after the Financial Management I Work Shop for all participants or during the first quarter: January throughout April.

**C. Service Department Profitability:** This workshop covers calculation of Direct Labor Costs and Vehicle Costs for pricing Demand Service Rates or Flat Rate Service Pricing Rates. It also covers implementing Residential Flat Rate Pricing as well as a review of service tickets for both methods. Pricing and Marketing Residential and Commercial Service Agreements including sample Service Agreement Forms. The audience includes owners, service managers, dispatchers, and even service techs. This workshop requires a six-hour session. I would recommend conducting this workshop at almost any time during the year because it contains techniques for increasing sales and profits that could be utilized immediately.

**C. Service Department Profitability:** This workshop is also designed to act as a motivator for service managers and owners. Suggested dates: January 15th through May 15th and August 15th through December 15th.

**D. Service Tech Marketing & Customer Relations (for Techs):** this work shop addresses service tech marketing and focuses on training for service techs in listening skills and identifying customer buying signals including service agreements, accessories, and generating equipment leads. It also includes customer relations training for service techs and service support staff in such topics as "paper work", billing, unreasonable requests, and dealing with angry / abusive customers. The audience is primarily service techs and support staff. This workshop requires four hours and can be conducted in the late afternoon or evening if desired. I would recommend conducting this workshop at almost any time during the year because it contains techniques for increasing sales and profits that could be utilized immediately. It is also designed to act as a motivator! Suggested dates: January 15th through May 15th and August 15th through December 15th.

**E. Service Tech Marketing & Customer Relations Programs (for Owners & Managers):** this work shop covers service tech marketing, including the sale of service agreements, accessories and equipment replacement leads for both residential and commercial customers. It also includes incentive programs and customer relations training for commercial and residential service techs, receptionists dispatchers, and even service managers. This workshop is geared towards owners and service managers explaining how develop these programs and introduce them to the service techs. The audience includes owners, service managers, dispatchers, receptionists and service techs. This workshop requires a five to six hour session. I would recommend conducting this workshop at almost any time during the year because it contains techniques for increasing sales and profits that could be utilized immediately. It is also designed to act as a motivator! Suggested dates: January 15th through May 15th and August 15th through December 15th.

**F. Residential Sales and Sales Management Training**, this works shop covers one and two call sales training, the four goals of a measure appointment, the five steps of selling, and proper follow-up as well as the techniques and reports used in managing a sales staff. The audience includes owners, the sales staff and even service techs. This workshop requires a five to six hour session. I would recommend conducting this workshop prior to the start of the Cooling or Heating Season because it contains techniques for improving closing ratios and sales management that could be utilized immediately. It is also designed to act as a motivator! Suggested dates: January 15 through May 30th and August 15th through December 15th.

**G. Residential Marketing Plans and Strategies**, this work shop covers all forms of advertising: direct mailings, media, Yellow Page strategy, direct contacts, and telemarketing; lead generation, creation of planning calendars, promotion calendars, and budgets. The audience includes owners, sales managers, sales staff, sales / marketing support staff. This workshop covers mega material and could require one long seven-hour session. This type of planning should be done by the start of the calendar year when possible and certainly by the start of the Spring Cooling Season or Fall Heating Season. Suggested dates: August 15th 1st through May 30th.

**H. Organizational Structure and Procedures**, this workshop covers creating Organizational Charts, Job Descriptions, and Written Procedures. It also covers Meetings, Time Management Skills, and Human Resources Issues: Recruiting, Interviewing, Compensation, Evaluations, Reviews and Training Plans. The audience includes owners, managers, and support staff. This workshop requires a six-hour session. This type of planning and attempt to provide proper structure and documentation should be done towards the end of the calendar when possible and prior to the start of the Spring Cooling Season. Structure and Organizational Change take considerable time to achieve results. Suggested dates: September 1st through May 30th.

**I. Installation Production Management**, this workshop explains how to control the cost of Installation Labor and Materials including a complete Production Management, Billing and Scheduling Tool: Backlog Report. **Software Included!** The audience includes Owners and Production Managers. This workshop requires one six hour session. This type of training so valuable that this workshop should be offered at any time. Suggested dates: Any time possible!