

## **The "HVAC" Business Doctor's Two to Four Hour Workshops**

**A. Production Management and Backlog Report:** this workshop covers practical production management procedures and policies to improve the field's staff productivity and reduce material costs. I continue by explaining how to track sold Man Days and measure the firm's backlog by introducing my Backlog Report. A firm's Backlog should drive Pricing Strategy, the use of OT, and Field Staffing Plans. The report also assists in Project Billing. The audience includes owners, project or installation managers, and bookkeepers. This workshop can be conducted in either a two or four hour version. Suggested Dates: January 15th through May 15th and August 15th through December 20th.

**B. Interpreting the P&L Statement:** this workshop covers the interpretation of a Contractors P&L Statement. It begins with a look at Sales Mix, continues with all Direct Costs including target Material and Labor Cost percentages by profit center. The calculation of a firm's Daily Direct-Cost of the Billable Vehicles is reviewed. Overhead is reviewed and I introduce the correct methods to measure the firm's Average Monthly Overhead and true Breakeven Point. The audience includes owners, project or installation managers, key sales staff and estimators as well as bookkeepers. This workshop can be conducted in either a two or four hour version. Suggested Dates: January 15th through May 15th and August 15th through December 20th.

**C. Collections / Credit Policies and Procedures:** this workshop covers how to introduce a Credit and Collection Program, including setting credit limits and a sample Credit Applications. It also explains an effective time line for Collection and the proper procedures including phone calls, statements, collection letters. Other options such as collection agencies, collection attorneys, mechanic lens and small claims court are discussed. The audience includes owners and bookkeepers. This workshop can be conducted in either a two or four hour version. Suggested Dates: January 15th through May 15th and August 15th through December 20th.

**D. Recruiting, Screening, Interviewing and Hiring Qualified Staff:** this workshop addresses the problems of recruiting and hiring qualified staff. The workshop includes the proper timing for recruiting and techniques to acquire more candidates. The screening process is discussed including technical testing and drug / alcohol screening. Actual interview questions and questioning techniques are covered as well as how to conclude an interview. The final issue is making an offer, hiring the individual, establishing Job Descriptions and the review process. The audience includes owners, department managers, and bookkeepers. This workshop can be conducted in either a two or four hour version. Suggested Dates: January 15th through May 15th and August 15th through December 20th.

**E. Creating an Annual Budget:** this workshop shows a contractor how to take his mental image of his firm's business / operating plan and state it financially in a budget. We start with a staffing plan, continue by forecasting sales using history as well as capacity. We set goals for all Direct Costs including Departmental Labor and Material percentages, Payroll Taxes, Workmen's Comp, Subcontractors, and Billable Trucks Costs, ect. We continue by setting goals for all Overhead Expenses: Marketing / Advertising, Office Staff, Training, ect, ect. Will the contractor's plan produce a profit? The audience includes owners, departmental managers, and bookkeepers. This workshop can be conducted in either a two or four hour version. Suggested Dates: January 15th through May 15th and August 15th through December 20th.