



Retail Residential Installation Department Business Systems TRANSFORMATION PLAN

Professionalize Your Residential Replacement Operations TODAY!

Within 4 weeks of client start date, Business Fitness Coach helps establish the following business systems:

- Replacement Lead Generation Procedures
- Professional HVAC Replacement Sales Call Handling Procedures
- Which HVAC/R Contractor Best Meets Your Needs questionnaire
- Upfront Replacement Proposal-Agreement and Selling Process
- Professional HVAC Replacement Sold Job Booking, Mobilization, and Installation Procedures
- Job Stock Inventory Control

Client Business Benefit Objectives: (as reported by our enrolled clients)

- Close 2 out of 10 sales calls to a sold accessory add-ons, or additional quoted work.
- Close 6 out of 10 Request for Quote sales calls to a sold replacement using the “One-Call Close” selling system.
- Close 8 out 10 catastrophic repair calls to a sold replacement on using the “One-Call Close” selling system.
- 99%+ error free replacement installation by implementing our proper replacement opportunity assessment, upfront pricing, sold job booking, as well as, our proper installation mobilization, work delivery execution, startup, test and verification, and daily job completion status reporting processes.
- Implement our written best-practice service-truck stock and restocking program.
- Deliver consistent quality on all residential replacement installation work per our written best-practice installation standard operating procedures.

During week #1:

1. We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.
2. Upon completion of session, Business Fitness Coach registers you and your staff separately to access online training sessions.
3. Upon completion of session, Business Fitness Coach will send you the next week’s Growth Strategy Session Workout Meeting invite.
4. Upon completion of session, Business Fitness Coach sends you a 1-page Home Comfort Certified System Flat Rate Replacement Pricing Set-up Form for you to download, complete and fax/scan and send back us for configuring per your financial requirements for your residential service repair pricing.



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5. Upon receipt of your “Home Comfort Certified System Set-up Form”, your Business Fitness Coach will request you provide, as an email attachment, your equipment vendor equipment pricing for us to import into your “Home Comfort Certified System Flat Rate Replacement Price Guide”.
6. Upon completion of session, Business Fitness Coach will send you an email of what online sessions to take on our Client Solution Center to obtain our complete residential replacement installation price guide, professional service and sales call handling procedures, customer & system diagnostic forms, replacement proposal agreement, performance based pay, booking, mobilization, and installation delivery system.
7. You, your Installation Manager and your Selling Technicians/Comfort Advisors staff will simply go to our Online Solution Center home page, click top right “Client Login” to access these training tracks: (2 – Dark blue sessions are for your selling technicians/comfort advisors)
 1. RR-STEP #1.0 Home Comfort Replacement Flat Rate Pricing Guide Set-up
 2. RR-STEP #2.0 Marketing Residential Replacements for Profits
 3. RR-STEP #3.0 Professional Sales Call Handling Process
 4. RR-STEP #3.1 Closing more at higher margins with the with the “One-Call” Selling Process
 5. RR-STEP #4.0 Efficient written standard procedures for replacements
 6. RR-STEP #5.0 Stocking installation inventory for profits
 7. RR-STEP #6.0 Daily labor and opportunity conversion performance benchmarking
 8. RR-STEP #7.0 Paying Crew Chiefs/Installers for Profits
 9. RR-STEP #7.1 Paying Replacement Salespeople for Profits
8. For our next Growth Strategy Workout Session Meeting, client tries to complete and print out the following technician handouts:
 1. Order “Install-Right Proposal Agreement” from our preferred print vendor.
 2. Print out 1 per Selling Technician/Comfort Advisor the “Home Comfort Certified System” Flat Rate Installation Price Guide.
 3. Print out 20 of the 1-page “Install-Right System Diagnostic Form” to be used by selling techs and comfort advisors on all sales calls – See RR-3.0
 4. Print out 20 of the 2-page “Which Contractor Best Meets Your Needs” questionnaire. See RR-3.0.
 5. Print out and review for our next meeting the “Sold Job Booking Approval”, “Work Order Instructions”, “Start-up, Test and Verification” and “Customer Satisfaction Survey” Forms – See RR-4.0
 6. Print out and read for our next meeting the “Crew Chiefs/Installers Performance Based” Pay Plan – See RR-7.0
 7. Print out and read for our next meeting the “Selling Tech/Comfort Advisor Performance Based” Pay Plan – See RR-7.1

During week #2:

9. For this next meeting, Business Fitness Coach will demo with management and get their approval on which Installation Department Company Standards to have us help you implement.
10. Upon completion of this session, Business Fitness Coach will send you the next week’s Growth Strategy Session Workout to be conducted with selling technicians/comfort advisors meeting invite.



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During week #3:

11. For this next meeting, Business Fitness Coach will demo to your Selling Technicians/Comfort Advisors your approved Home Comfort Replacement Price Guide, pricing methods, the professional sales call handling process & forms, installation proposal agreement, performance based pay, as well as, post call debriefing to identify sales opportunity conversion rates versus expectations.
12. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.
13. However, if you have enrolled in all 6 Departments, you also have our Human Resource Management Business Systems and therefore your Business Fitness Coach will schedule the meeting to implement our Performance Based Job Descriptions for your Installation Manager, Dispatchers, Selling Technicians/Comfort Advisors, and Installers to tie them to your Installation Department Company Standards.

During week #4:

14. For this next meeting Business Fitness Coach will discuss how best to set up your replacement job stock inventory control processes and forms. See session RS-5.0.
15. We also discuss the implementation of replacement installation written work delivery standards. See session RR-4.0.
16. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.

Performance Review Meetings:

17. We recommend that you schedule periodic Installation Department reviews with your Business Fitness Coach to enable operational adjustments to help you to continue to meet your above Client Business Benefit Objectives.