SUMMIT 2018
Blaze Your Trail to High Performance

Your Step-by-Step Map to Implementation

1 Choose a Champion. Determine who will lead the effort and help keep everyone accountable and on-track.

2 Train your team. Begin training your field and support people. To minimize disruptions, train a few people in each area at first.

3 Purchase the right test instruments. It's wiser to purchase better instruments as budget permits than buy a bunch of cheap ones that will frustrate your techs and make their work more difficult.

4 Clearly define which measurements are mandatory on every service call, maintenance call, and installation. Don't require too much up front, build on their testing habits.

5 Establish roles and boundaries for everyone involved. Don't let people veer too far out of their lanes. It will frustrate their coworkers and shut down cooperation. Designate how handoffs occur, who follows up, and where the information goes.

6 Practice, practice, practice. Before getting in front of customers, it's important to help your field people build confidence in their testing abilities. Have them practice testing in the shop, in their own homes, and/or family member's homes.

7 Get your entire team on board. The quickest way to get buy in from everyone including CSRs, dispatchers, sales staff, field and and office personnel is to test and repair their homes. Offer to provide materials and labor at cost or free. It will be a valuable investment.

8 Strengthen your diagnostic and problem-solving abilities. Hold refresher training classes using NCI materials. Present unique system performance problems and work on solutions together. When possible, include hands-on testing.

9 Practice simplified communication skills. One of the keys to success in selling customers on air upgrades and other renovations is knowing how to explain complex issues in simple layman's terms. Create a vocabulary cheatsheet on words to use and not use.

10 Reward employees based on testing and repair results. Create healthy competition among your techs. Recognize and reward consistent culture of testing and offering customers solutions.

11 Provide collateral material for techs, sales, and marketing. Create simple materials that support the type of work you do. Check out NCI's online library for hundreds of downloadable materials.

12 Update your service invoices to include performance testing and provide space for recommended improvements.

13 Use Comfort-Maxx™ software to standardize your testing processes, generate leads, and test out to prove delivered performance.

14 Follow up with customers on poor test results. If a tech is not ready to discuss findings with customers, or you're in the middle of your busy season, follow up later with a letter explaining the test results in your ComfortMaxx report.

15 Offer repairs for diagnosed system defects. Provide simple, flat rate priced Air Upgrades that address major airflow issues. If you provide a simple pricing calculator, your techs and salespeople will be more comfortable with offering these solutions, and do it more often.

16 Perform standardized repairs to reduce static pressures and increase fan airflow. As your team gets more experienced you can start to offer deeper solutions that better address comfort, health, safety and energy efficiency.

17 Test-out to verify your improvements work. Train your installers to test their work. They will learn from their testing and improve their installation skills. They will also learn to identify additional potential work to make systems perform at high levels.

18 Provide professional looking reports. This will delight your customers who will in turn refer you to their family, friends and neighbors. ComfortMaxx makes providing easy to understand reports a breeze.

19 Continue to provide High Performance through your service agreements. Create service agreements that include the air distribution system so you can maintain your customers' systems for optimum performance.

20 Rinse and repeat. Once you have implemented Steps 1 through 19, repeat the process to introduce BTU measurement and delivered efficiency.

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