

# Welcome to Momentum '24



# Customer Persona Development Market Sector

Presented by Chris Barber & Cody Havard



# Verticals: Why We're Here

- Market analysis is a detailed assessment of your business's target market and the competitive landscape within a specific industry

Nashville		Raleigh		Houston		Austin		DFW		SA Mech		Charlotte	
Hospitality	59k	Education	645k	Education	2.783M	Retail	624k	Education	1M	Retail	368k	Hospitality	129k
Healthcare	27k	Hospitality	136k	CRE	2.167M	Healthcare	412k	Industrial	694K	Healthcare	354k	Healthcare	105k
Religious	21k	Industrial	104k	Public	1.323M	Public	310k	Hospitality	455K	Industrial	252k	Education	73k

SI Mechanical LLC	HVAC Equipment and Products, not to exceed standard hourly labor rate for Installation/Repair Service of HVAC Equipment and Products.	\$125.00	Texas Chiller Systems	Standard Hourly Labor Rate for Installation/Repair Service of HVAC Equipment and Products, not to exceed standard hourly labor rate for Installation/Repair Service of HVAC Equipment and Products.	\$130.00	Yes
TDIndustries, Inc	Standard Hourly Labor Rate for Installation/Repair Service of HVAC Equipment and Products, not to exceed standard hourly labor rate for Installation/Repair Service of HVAC Equipment and Products.	\$125.00	Daikin Applied	Standard Hourly Labor Rate for Installation/Repair Service of HVAC Equipment and Products, not to exceed standard hourly labor rate for Installation/Repair Service of HVAC Equipment and Products.	\$165.00	Yes
The Brandt Companies LLC	Standard Hourly Labor Rate for Installation/Repair Service of HVAC Equipment and Products, not to exceed standard hourly labor rate for Installation/Repair Service of HVAC Equipment and Products.	\$125.00	Trane	Standard Hourly Labor Rate for Installation/Repair Service of HVAC Equipment and Products, not to exceed standard hourly labor rate for Installation/Repair Service of HVAC Equipment and Products.	\$209.00	Yes

- 80 / 20
- Long Term Success ADP  
Account Manager: \$1M Contracts

- Service Work
- Preventative Maintenance
- SSP



# Tactics



1. Go where the Facility Managers are:  
IFMA, ASHE, and TAHFM

- View and follow on LinkedIn! 



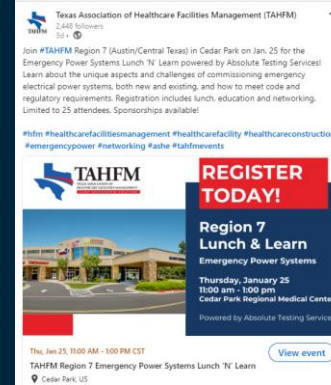
2. Many large projects are timed  
around shutdowns:

- When are they?



3. Education: ISD's always have  
something they need support on:

- Chillers, PM's, Changeout's
- Dropping in is the #1 way to get an opportunity
- Higher Education relies on relationships to counteract public bid systems



### \*Homework\*

Call on your top healthcare clients  
and ask them what industry events  
they will be attending this year.

Reflect how you have worked your  
way around public bid situations.



# Breakout Session

- How did YOU break into these industries?

Healthcare   Industrial   Education   Top Clients

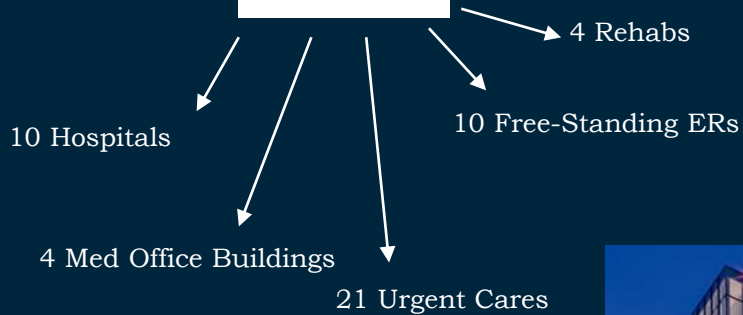
- How did you finally land a meeting?
- What tactics did you use?
- What industry do you have the most success in?
- How do you approach this industry?
- Most creative outreach method?
- Most outreaches before a meeting?
- Coolest event / trip / experience with a customer?
  - Outside of Dove Hunt



# Markets: ADP



One Company  
50+ Buildings  
12+ Independent Decision Makers



- Who are the decision makers next door?
- How can I help them?
- Where is everyone gathering?



**\*Homework\***  
Collect 10 referrals between February and March.



Any  
Questions?



# Building Rapport and Trust

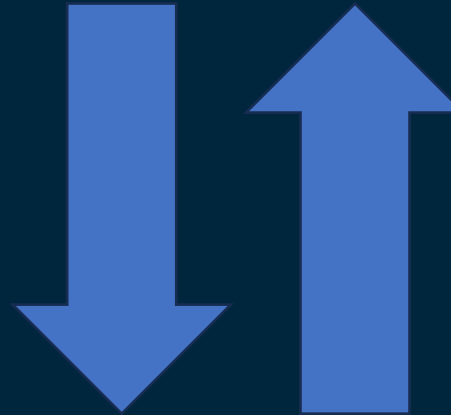
Presented by Justin Winnett & Mike Getsinger





# What is Rapport?

- Definition:
  - A close and harmonious relationship in which people or groups understand each others' ideas and communicate well.



# Various Way's to Build Rapport

- Open Communication
- Make It Personal
- Active Listening
- Keep Your Word



# Building Trust

- Transparency: Open Communication & Accountability
  - Follow Up, Follow Through
- Responsiveness
  - Sending Out Bids
  - Job Updates (good...and the bad)
  - Correcting Invoices
- Punctuality
  - Set Calendar Invites
  - Don't Waste Your Customers Time
- End Goal
  - Keeping a Team Mentality
  - Making Your Customer Feel Important



# Customer Outings

- Breakfast / Lunches
- Golfing
- Sporting Events



# Handling the Tough Conversations

- How should we interact with a customer after a fall through?
- Examples:
  - Miscommunication (Scheduling)
  - Bad Install (Callbacks)
  - Price Increases (Change Orders)
- Solutions:
  - Respond with a Sense of Urgency
  - Understand their Perspective
  - Communicate the Expectation



# Setting Reoccurring Meetings

- The “Why”
  - Organizes Your Time With The Customer
  - Allows You to Take the Driver Seat & Set the Agenda
  - Creates a Sense of Belonging
  - Helps Build a Strong Relationship Between You and Your Customer




# Makes Your Life Easier

- Time blocks you and the customer without having to setup each meeting.
- Consistency...
- Efficiency...
- Better Planning...
- Enhanced Collaboration...
- Accountability...
- Long-Term Goals...
- Progress Tracking



# Calendar Invites

 Occurs the second Friday of every 1 month(s) effective 1/12/2024 until 1/12/2025 from 2:00 PM to 2:30 PM  
No responses have been received for this meeting.



Title

Way Mech Stop In

Required

[James Burns <jburns@lakechurchdfw.org>](mailto:jburns@lakechurchdfw.org)

Optional

Start time

Fri 1/12/2024



2:00 PM

Central Time (US & Cana

All day



Time zones

End time

Fri 1/12/2024



2:30 PM

Central Time (US & Cana

Location

2912 Little Rd, Arlington, TX 76016





# Customer Frequency

*You haven't sent this meeting invitation yet.*

**Send**    Title: **Way Mech Recurring meeting**

**Required**    **Aaron O'Dell**

**Optional**

Start time: **Fri 1/19/2024** **8:00 AM** **Central Time (US & Canada)**     All day

End time: **Fri 1/19/2024** **8:30 AM** **Central Time (US & Canada)**    [Make Recurrence](#)

Location: **720 Industrial Blvd (720 Industrial Blvd, Grapevine, Texas 76051)**

**Appointment Recurrence**

**Appointment time**

Start: **8:00 AM** **Central Time (US & Canada)**

End: **8:30 AM** **Central Time (US & Canada)**

Duration: **30 minutes**

**Recurrence pattern**

Daily    Regur every **1** week(s) on:

**Weekly**     Sunday     Monday     Tuesday     Wednesday

Monthly     Thursday     Friday     Saturday

Yearly

**Range of recurrence**

Start: **Fri 1/19/2024**     **End by:** **Fri 7/5/2024**

End after: **25** occurrences

No end date

**OK**    **Cancel**    **Remove Recurrence**



# Service Call's and PM's

**MOMENTUM 24**

**WHEN THE CLIENT SAYS "WE ARE EXPLORING  
OTHER PLATFORMS TO SUPPORT OUR NEEDS GOING FORWARD."**



imgflip.com



# Final Questions

- Name me one customer you currently have reoccurring meetings with.
- Give me one benefit you've seen from these meetings.
- Name a time when you fell short on a project and what you did in response to mend that relationship.



Any  
Questions?



# Pick Up Margin Points in Estimating

Presented by Jake Johnson



# Agenda

- Negotiation and Upselling Techniques
- How Do We Make Profit?
- Group Project



# Introduction

**Profit:** A financial gain, especially the difference between the amount earned and the amount spent in buying, operating, or producing something.

**Margin:** An amount by which a thing is won or falls short.



# “LET\$ MAKE \$OME MONEY”

- **Prep Work Questions:**

- Where do I start on this quote?
- Do I have all the correct information to quote this project and if I don't, where can I get this information?
- What are some things that could go wrong during this project that I may want to consider putting into my pricing?
- Is this going to be a tight bid, or can I make the company some money while making my customer satisfied at the same time?
- If I was a technician, how long would this take me to do if everything went “perfect”?
- Will I need subs for this work, or is the ball 100% in our court?
- Is this project worth quoting?
- How can I (salesperson) make this job successful?





Topic One:

# Negotiation and Upselling Techniques



# How Do We Make Profit?

1. By Buying For Less
2. By Selling For More

**Let's discuss as a group how do we do this!**



# How Do We Buy For Less?

- Call multiple vendors and get multiple quotes. (They will not be the same, including lead time)
- During your job walk **“TAKE NOTES”** of exactly what is needed.
  - Example: The number of fittings, piping, any materials needed to complete that job.
- This will make your pricing accurate vs. throwing blank numbers. This is **HUGE** in making successful bids for our team.
- Be **“accurate”** on hours, but also don’t give your technicians a perfect scenario amount of time to get the job done. Always put in a little extra.



# How Do We Sell For More?

- Add in “fluff money”
- Be in the green!! (in GM\$MH-Final Sales Price)
- Increase your margin
- **CLOSE BEFORE YOU PROPOSE!!**
- I know all of you are doing this, and if were not close enough with our customers to do this it is our job to get that close to them to do this. It's a lot easier to increase your price when your customer gives you a number to win the job at.



# “I have everything ready to go, what’s next?”

- Add in “EXTRA” money
- We as a team must and ALWAYS add in some fluff money and more importantly add in our profit margin.
- Be in the Green: The grass isn’t always greener on the other side, BUT it is always better if your profit margin is in the green. If it is in Red, there should be a great reason for it or because your Branch Manager approved it with good reasoning.
- Equipment & Sub Pricing Heavy: This will always be your best opportunity to raise your percentages and result in more profit. Labor heavy projects will always profit the most money.



# Sell Me a Job (Group Project)

Get in a group and let's get going!!!



# 20 Ton RTU Change Out

**MOMENTUM 24**



# Get In a Group & Put This Together

- Break down everything you think you will need to do step by step to successfully put this job together.
- Look closely at the unit and identify things that need to be taken into consideration.
- Keep in mind this is a 20 TON RTU getting changed out on a 3-story building.





# Thank You!

- Everyone of you are in control of being a successful salesperson on our team. Luckily for all of us we have each and everyone on our team more than willing to help you be successful. All you have to do is (ASK)!

*“The one who wins the race is the person that never took their foot off the pedal.”*



Any  
Questions?



# Service Design Build Construction

Presented by Coleman Ashworth & David Dunnigan



# Training Agenda

- Overview of Sales Landscape
- Advancing Account Development
- Project Conception and Feasibility
- Preliminary Design and Cost Estimation
- Selecting the Design-Build Team
- Design Phase
- Finalizing the Contract
- Case Studies
- QA/QC



# Overview of Sales Landscape

- Design-build construction is a delivery method that involves a single contract between the owner and the builder. This model works with our service team perfectly.
  - Single Point of Contact for Owner
  - Increased Efficiency
  - Better Collaboration
  - Cost Savings
  - Accuracy



# Advancing Account Development

- Incorporating Service Special Projects into Your ADP Strategies.
- The capability to address intricate challenges distinguishes excellence.



# Design Build Process Graphic



# Project Conception & Feasibility

- The owner starts to form a picture of the project's scope, budget, and schedule to determine its viability further. During project conception, collaboration with design-build teams offers the advantage of pulling in the architects and engineers early to help shape the project.





# Preliminary Design & Cost Estimation

- Owners will pull in the expertise of a design-build team to form early visual representations of the project through building information modeling (BIM) and virtual design and construction (VDC). Early collaboration could give design-build teams a leg up because this early collaboration offers better insights into project design, scope, budget, and timeline.



# Selecting the Design Build Team

- By this point, the owner can develop a draft request for proposal (RFP) and provide it to selected proposers, who can ask questions and make qualifications before bidding and before the owner finalizes an RFP. The owner will seek out proposers who offer value in delivering project goals rather than selecting the lowest price.



# Design Phase

- During this phase, the design-build firm and owner will develop conceptual designs for the new project, firming them up enough to settle on realistic contract terms, including defining performance/specification requirements, construction schedule, schedule of values, and customer requirements.



# Finalizing the Contract

- Once the project has a firm scope, schedule, and design, the design-builder and the owner can come together on a final contract cost.



# Case Studies & Examples

- Woodlands Methodist
- Harmony
- SMU
- ARBC
- UHD



Methodist Woodlands PT HVAC Engineering Analysis - Infinity MEP.pdf



# Conclusion & Q&A

- Open the Floor for Questions & Group Discussion

**MOMENTUM 24**



Any  
Questions?



# Head to Main Room for Group Photo Instructions

