

Emerson “Fits Your Business” Webinar Series

April 23, 2020



About the “Fits Your Business” Webinar Series

- Ongoing monthly learning delivered to contractors to help educate on a range of topics, products, and business insights geared toward pros currently working from home during the Coronavirus Pandemic.
- Supplements Emerson’s Business Training available at <https://climate.emerson.com/en-us/brands/white-rodgers/hvac-business-training>
- Format:
 - 30 Minute Webinars with various Subject Matter Experts
 - Followed by quick Q&A
 - Content available at the Business Training website link above

Business as Unusual: Succeeding Remotely during Covid-19

Ways you can reach your customers remotely during Covid-19 and take your business to the next level.

About Brian Peters

- Chief Encouragement Officer and Owner of Evergreen Heating and Cooling, Waco, Texas
 - Jan. 1st, 2014 – Present (6 years)
 - In the Residential HVAC industry for 17 years
 - Spent time as a Salesman - Waco, Texas. 5 Years
 - Operations Manager Capstone Mechanical – Waco, TX – 3yrs
 - Sales Training for Nationwide HVAC Franchise Aire Serv – 3yrs
 - Owner of residential HVAC company – Waco, TX 6yrs



Evergreen Background

Evergreen Heating and Cooling provides residential HVAC service, repair, annual maintenance, and new system installation in the great Waco, Texas area. Evergreen currently has 9 total employees with 6 Service/Install vehicles in the field.

- 6 Years in the business
- Previous Rev of \$400k in Service/Repair/Replacement and \$800k in New Construction
- Present Rev of \$2.5-Million in Service/Repair/Replacement
- Providing customers with services that are consistent, convenient, clean and comfortable has allowed Evergreen Heating & Cooling to grow its revenue, team and profits.



Previous Business State before technology

- Paper Tickets, Hard Files, Phone Calls
- Single-Stage Equipment, non-communicating thermostats
- Tech Meetings filled with hand-outs
- Lots of Yellow Legal Pads with notes all over the place



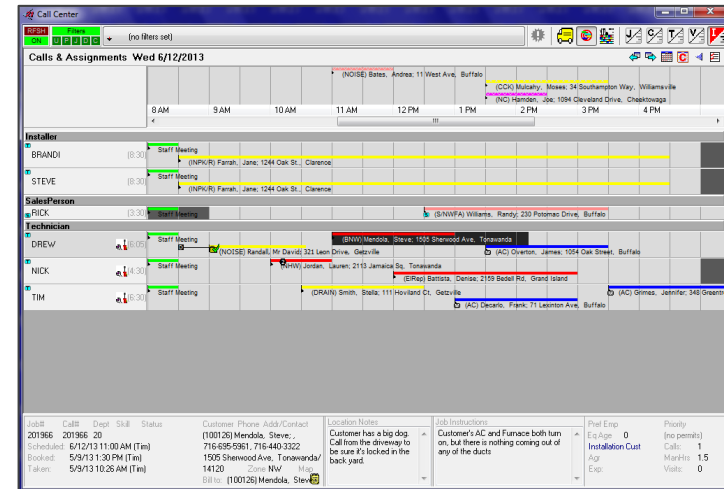
4 Tactics that drove our success during Covid-19

- Software that allows us to run the daily business
- Website Development to allow Mobile connectivity
 - Chat, text, call or email
- Facetime with techs and with customers
- Online Finance Options



Software that allows us to run the daily business

- SW21 - Cloud based software with web-portal, desktop access and iPhone/iPad application
- All customer data stored in file – location, service history, model and serial of existing equipment, email, phone, notes, marketing lists and information
- A few ways that using software has helped us:
 - Customer tracking – know what marketing \$\$'s worked
 - Service history in our hands while at the customer's house
 - All customer info when existing customers call in
 - Manage Maintenance agreements



Our best COVID-19 resource

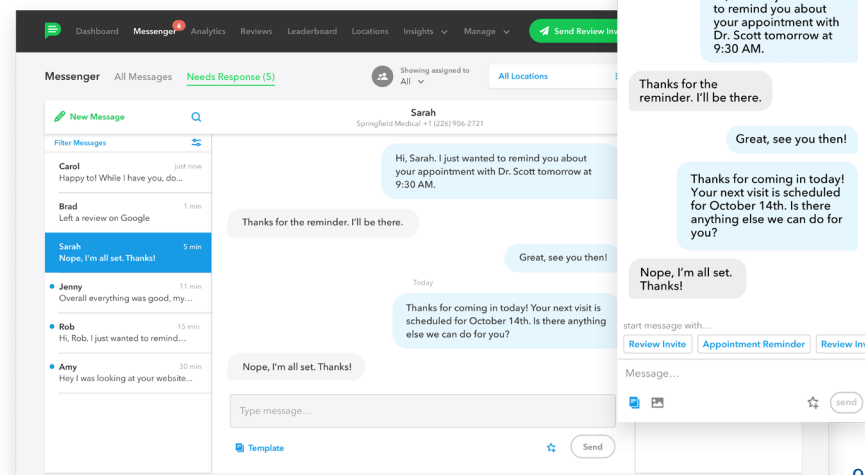
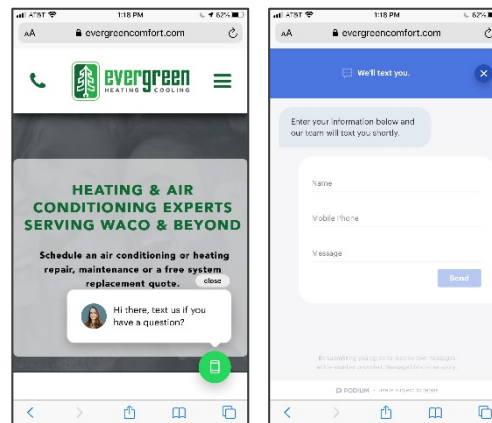
Mass templated texts to 10-30 maintenance customers go out each week. And we stay in contact when we are in route + the customer is able to immediately text right back if their system needs service.

Website Development to allow Mobile connectivity through chat, text, call or email

- Podium is integrated onto our website, with a simple phone app
- Allows us to text customers/ respond immediately
 - Can also answer questions, book calls, give estimates, send review links, confirm appointments, etc

During COVID-19

Office and techs are able to see classification of the service call – maintenance, repair, replacement. In turn allows us to look ahead in the schedule, and connect with customers to ease their concerns, or to reschedule due to COVID restrictions



Facetime with techs and with customers

- Asking customers if it is okay to Facetime them, then looking at their systems, finding out if the breakers are tripped, drains are backed up, fan is on or off, etc...
- We have had great response to this technology and saved a lot of trips to verify information

For example, a recent service call on a thermostat issue drove easy customer solution (emergency float switch in the drain) and has now led to follow-up maintenance call with that same customer.



Online Finance Options

- Service Finance, EnerBank and Greensky
- We can text a link to the customer and ask them to fill out the application, and then they get an immediate response and the details on the plan we discussed.

During COVID

We have used mobile finance apps before going in to the house for folks who were wanting to replace their system this spring. They have been approved over the phone/app, and then decided what unit they wanted before we actually got there. (The stimulus checks have helped!)



Resulting Business State

- Grown to \$2.5-Million Revenue with a 42% GP with 9 Total Employees (counting the 2 owners)
- All Revenue is from Service, Repair, Maintenance and Replacement in Residential HVAC
- Peace of Mind and Quality of life have gone up
- Business Value has gone up due to systems and technology

Q&A

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