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Upcoming Training Schedule

Visit TheUnifiedGroup.com to register.

2024 Financial Forum

August 18 - 21
Nashville, TN

2024 Construction Forum

October 2 - 5
Portland, OR

2024 Annual Meeting & Owners' Forum

November 10 - 14
Punta Cana, Dominican Republic

2025 Service Management Forum

January 29 - February 1
Charleston, SC

The United Connection is a quarterly newsletter that is your four-page sneak peek into the information that gets shared within our network of elite contractors - The Unified Group. It includes tips, advice, quality information, and member testimonials to help you become an even stronger resource for your customers. If interested, contact Janet Kelleher at KelleherJ@theunifiedgroup.com or (708) 356-5072.

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The Unified Connection
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2024 Technicians' Forum Highlights



Rosemont, IL – More than 30 HVAC Technicians from across the country attended The Unified Group's first Technicians Forum in March. The conference took place at the Hilton O'Hare in Rosemont, IL and included two full days of learning, best practice sharing and networking.

"I really came away with some great tools from all of the discussions to be able to apply immediately on the job and in my everyday life," said Tyler Starliper of Blaich Brothers in Harrisonburg, VA.

Nic Bittle, Founder of Work Force Pro, led the first day of the forum. An industry leader, author and creator of professional development programs, Bittle works with contractors and organizations that want to prepare and develop their workforce to lead with impact.

His presentation began with a communication/relationship building exercise where attendees broke into smaller groups and discussed what they were excited about. Other group members then asked questions to dig deeper. Many doors in this industry are opened through building relationships, and the exercise showed how spending a few minutes getting to know someone a little better will help to form a deeper relationship.

Attendees spent time discussing different mindsets that the technicians deal with on a daily basis and received a friendly reminder to not let ego drive your attitude. Bittle shared tips on how to have tough conversations by always asking permission to do so, presenting the facts, being honest and giving the other party the information they need to succeed. Lastly, attendees learned how a career mindset is different than just a job mindset, and that there are two important days in everyone's life: the day you were born and the day you find out why.

"In this short time, I feel as though I have learned more about myself and additional areas that I can improve on that I wasn't even aware of," said Matt Maxwell of Air Controls (Billings, MT). "I look forward to being able to implement this newfound knowledge and utilize it to help other coworkers or family members. I can honestly say that I believe I am a better communicator and leader than I was a day ago. Many thanks to Nic for sharing with us."

Eric Miske, Owner of EES Facility Services (Dayton, OH), served as the meeting MC. On the second day, he shared the actual cost versus profit of an hour of service by breaking down benefits, office wages, licenses, etc. This was an eye-opener to many as not everyone realizes how many expenses come out of an hourly rate. Frank Quintanar, Owner and Service Manager of J&J Air Conditioning (San Jose, CA) facilitated a panel discussion revolving around how technicians stay organized in the field; tracking outstanding jobs, start-up meetings, tracking parts. The panelists and attendees participated by sharing their daily struggles and how they overcome them.

In the afternoon, Marcus Quintanar and Salvador Pedroza Ceja from J&J Air Conditioning showed the group how they create and share curriculum to train technicians on topics ranging from hands-on equipment training to customer service skills.

The Unified Group's first Technicians Forum was a huge success. It was a great opportunity to join together those who are on the front line in the field to share laughs, camaraderie and learn from one another.



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Our Story

The Unified Group was founded in August 1998 by a core group of quality driven, independent mechanical contractors. When the consolidation movement kicked in and posed a threat to the HVAC industry, these contractors joined together to form The Unified Group.

Our members have moved beyond cooperation and into true collaboration. This is why we can say that together we make the difference.

MISSION

Our mission is to provide training and resources to promote the success of quality independent HVAC contractors, to raise the standards of excellence in the industry, and to ultimately increase the value provided to our customers.

OBJECTIVE

To build a national network of independent mechanical contractors dedicated to providing our customers with the best quality service in the HVAC/R industry.

GOALS

- Assist membership in growing their business and improving their bottom-line profits
- Raise the level of excellence in the industry
- Provide our members with the opportunity for continued improvement in all aspects of their business
- Share best practices among our members

Become a Member

"One of the most valuable aspects of these meetings lies in the networking opportunities, allowing for one-on-one conversations with other professionals who face similar day-to-day challenges."



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2024 Sales Forum Highlights



San Antonio, TX – Close to 30 HVAC salespeople from across the country attended The Unified Group's Sales Strategy Session in April. The conference took place at The Hotel Contessa in San Antonio, TX and included two full days of learning, best practice sharing and networking.

"Jeff's sales presentation really opened my mind up to doing things differently and identified things that I am currently doing that may not be very effective," said Mark Heikkila of Peterson Sheet Metal (Bemidji, MN).

Jeff Ruby, Founder of Red Rock Leadership, led the first day of the forum. Jeff has industry experience and was the head of sales for a national lighting contractor where he helped grow revenue from \$700k to \$5.8m in less than four years. In 2020, Jeff published RedRock Leadership: Transform Your Company Culture and Unleash the Potential for Exponential Growth, which outlines best practices that's helped strengthen thousands of business leaders around the world. His presentation began with helping the group to develop the proper mindset to be successful in sales. You want to be the trusted advisor for your customers, not the solution provider. He shared how to select a top 25 ideal customer target market by demographic (who), geographic (where) and psychographic (how they think). He reassured our salespeople that they need to know their worth and they are not only proposal providers. They need to complete their due diligence to give the customer a proposal only when they know it will be accepted and to begin with the end in mind.

"If I didn't attend this meeting, I would have missed the skills and techniques used to define a sales process, ways to follow the process, and ways to shift the mindset to get 100% of the business that we want," said Josh Dacres of VHV Company (Winooski, VT).

Chris Reiter, Service Division Manager of A&G Services (Fort Worth, TX) was the meeting MC and facilitated the second day of the session. We had member panels consisting of five member experts on each; sharing best practices on CRM systems they are using including the positives and negatives, success stories of members expanding their business by breaking into new markets, and key sales metrics members are measuring to keep on track. Juan Flores, Sales & Marketing Director, of Blanch Brothers (Harrisonburg, VA) facilitated a panel discussion asking members how they go to market, get in the door on cold calls, face objections and close the deal.

The group also had small group breakout discussions where they chose a topic they were most interested in learning more about. Those topics included selling controls, transitioning from the field into sales and the struggles faced, improving the construction sales process, prospecting and cold calling and ideas to maintain customer relationships.

"I was able to speak with so many people about what's worked for them and how to implement those ideas into our company. The best part of these forums is always the people I meet and phone numbers I come back with. It is great to be around so many friends that are willing to help wherever possible," said Clayton Wood of Legacy Mechanical (Denver, CO).

The Unified Group's Sales Strategy Session was a huge success. It was a great opportunity to get salespeople from across the country together to share ideas, create processes, build relationships and to go home empowered and ready to become even more successful.



SPAcademy offers modern, online, and affordable in-house training through our DOL-approved 4 year Apprenticeship Program and Continuing Education Program for senior technicians.



SPConnect provides Service Agreement estimating and proposal generation with an integrated CRM that has proven to increase productivity and professionalism, resulting in higher revenue.

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As we grow and strive for excellence, consistency and buy in, we have to recognize and grab on to the fact that people are unique and need to be engaged differently to get the alignment we need.

-Pansy Romo
Intech Mechanical



2024 Leadership Forum



B&I Contractors ladies at the SWFL Go Red for Women Luncheon during the American Heart Association's Bonita Springs gathering

