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**the Unified Group**  
TOGETHER WE MAKE THE DIFFERENCE  
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THEUNIFIEDGROUP.COM

## Upcoming Training Schedule

Visit [TheUnifiedGroup.com](https://TheUnifiedGroup.com) to register.

### 2024 Construction Forum

October 2 - 5  
Portland, OR

### 2025 Service Management Forum

January 29 - February 1  
Charleston, SC

### 2024 Annual Meeting & Owners' Forum

November 10 - 14  
Punta Cana, Dominican Republic

### 2025 BIM/Prefab Forum

February 26- March 1  
Fort Myers, FL

The Unified 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](mailto:KelleherJ@theunifiedgroup.com) or (708) 356-5072.

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# The Unified Connection

Join as a Member



## 2024 Leadership Forum Highlights



Nashville, TN – Over 35 attendees who are currently in a leadership role or an up-and-coming leader, joined together at The Unified Group's Leadership Forum from May 5th through May 8th. The conference took place at the Hyatt Centric Downtown Nashville.

The first half of day one of the Forum was led by Craig Woodall from Grinnell Leadership. Craig commenced his presentation by delving into the concept of leading through influence rather than power. Stressing the significance of positively influencing others, he introduced an engaging group activity—a scavenger hunt. In this exercise, each team of six participants ventured out around the town to locate a specific item assigned to them. Craig underscored the importance of adapting our leadership approach to suit the individuals we lead and discerning how our actions are perceived. A crucial aspect of fostering trust is recognizing that authenticity cannot be achieved merely by fulfilling a requirement.

During the latter part of our first day, we were honored to have Randy Nemchin as our guest speaker. Randy enlightened attendees on various strategies for establishing and upholding alignment and accountability within their teams. Randy educated us on the four foundational pillars of alignment: trust, values, accountability, and communication. Assessing whether a team is aligned involves observing behaviors, adhering to core values, and gauging feedback from customers regarding the company's performance. Without alignment, people will do what they want. Randy had each table work together on illustrating what it means to be 'aligned' and share the reasoning. Examples provided encompassed a rowing boat where each member was perfectly aligned in their rowing stroke and a harmonious musical orchestra.

On the second day of our meetings, Randy delved into the concept of work-life integration. Work-life integration is the practice of allowing employees to coordinate their personal and professional lives in a complementary way and fulfilling both sets of responsibilities. He introduced a self-assessment aimed at prompting reflection on our individual motivations and identifying areas requiring improvement for a more balanced life. This involved setting personalized goals to guide our investments of time and energy into various aspects of our lives. He emphasized that in doing so, it can result in greater productivity, job satisfaction and employee engagement.

Following Randy's half of the day, Craig then initiated an activity in which attendees communicated with a partner through text, and then with a phone call to draw a photo from their partner's instructions. Two significant lessons gleaned from this activity: the importance of thoughtful word choice before speaking and the practice of exercising patience.

During our final day of meetings, Rick Chowdry, President of Intech Mechanical, shared his journey of accidental success. Intech Mechanical's humble beginnings stemmed from Rick's garage, expanding to a small second shop, and eventually flourished into a fully functional HVAC mechanical contractor.



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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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TOGETHER WE MAKE THE DIFFERENCE



## 2024 Financial Forum Highlights



NASHVILLE, Tenn. — More than 20 Unified Group members gathered to attend the Group's 2024 Financial Forum, held August 18-21 at the Hyatt Centric Downtown Nashville. The event featured workshops, general sessions, roundtable discussions and breakouts on financial topics, which gave attendees the opportunity to hear from multiple perspectives and discuss challenges in an open environment with their peers.

"Today's forum on financial issues highlighted the interconnectedness of Unified Group meetings. I expected the discussion to focus solely on numbers, but it covered a broader range of topics, including recruiting, hiring, onboarding, retention, culture, time management, work-life balance and employee engagement," Tom Dacres of Winooski, Vermont's VHV Company said. "We also delved into profit margins and corporate-level annual budgets and their impact on overall strategy. Such a great way to exchange ideas."

Randy Nemchin of Radical Guidance Consulting gave a presentation on essential strategies for preventing profit fade in businesses to open the forum. Attendees gained insights into proactive measures to maintain or enhance profit margins, covering a range of tactics from controlling costs to optimizing pricing strategies, all aimed at ensuring sustainable profitability. He then introduced his trademarked "Productivity Compass," an instrument intended to aid in task prioritization and increased productivity, which taught attendees methods to reduce stress and achieve a better work-life balance.

The next half of the first day included a panel discussion on budgeting, which included tips, tricks, processes, strategies and tools. To wrap up day one, Liliana Gonzalez, of Intech Mechanical, and Tom Dacres of VHV Company gave a presentation on hiring and employee retention. Gonzalez emphasized the importance of empowering a company's number one asset, their employees. Dacres explained his "Delta Force Team Recruiting Plan."

In Tuesday's session, members shared presentations on ideas they have implemented within their organizations and how they've made a positive impact. These segments addressed EOS implementation, measuring productivity, an 18-month forecasting tool, and a shared accounting task calendar. Second day panels covered PO processes, data and device security, and monthly review of financial statements and dashboards.

"My biggest takeaway was the importance of connection between finance and operational work groups. Developing or strengthening relationships, creating trust and accountability will get us the forecasting results we need to be successful," Intech Mechanical's Pansy Romo said.

Overall, members of the Unified Group departed this year's Financial Forum with a wealth of new ideas and valuable connections.

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Breakout sessions are always one of the richest opportunities for hearing ideas from other very bright leaders. I am always amazed at the great insight, flexibility and confidence of members in this group!

JIM BLAUCH  
BLAUCH BROTHERS, INC.





## MEMBER SUCCESS STORY

MARK HEIKKILA  
PETERSON SHEET METAL



After The Unified Group's 2024 Sales Forum in San Antonio, Mark Heikkila with Peterson Sheet Metal experienced success brought out by the relevant sales training he had encountered. In his recent project with Lakewood Health Hospital, Mark expertly navigated the sales process for a building controls retrofit. By scheduling a meeting and asking insightful questions, he was able to uncover the owner's main pain points and concerns. He also discovered the project's budget, ensuring that their proposal addressed all of the owner's concerns while staying within budget. As a result of his thorough and responsive approach, he successfully secured the sale and is now actively working on the retrofit of the building controls. Together we make the difference!



"The forum on financial issues highlighted the interconnectedness of Unified Group meetings. I expected the discussion to focus solely on financial numbers, but it covered a broader range of topics, including recruiting, hiring, onboarding, retention, culture, time management, work-life balance, and employee engagement. We also delved into margin profit, corporate-level annual budgets, and their impact on overall strategy. Such a great way to exchange ideas."

-Tom Dacres  
VHV Company



### 2024 Financial Forum



## J&J Air Conditioning from San Jose, CA, and Intech Mechanical from Roseville, CA, recently hosted their first annual Skins Game!

