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Upcoming Training Schedule

Visit TheUnifiedGroup.com to register.

2025 Construction Forum

September 24-27
Boston, MA

* Tour of Environmental Systems, Inc.

2025 Design/Build Forum

November 16-19
Denver, CO

2025 Safety Forum

October 19-22
Denver, CO

2026 Service Management Forum

January 21-24
Fort Worth, TX

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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2025 Small/Special Projects Forum Highlights



Fort Worth, TX- The second ever 2025 Small/Special Projects Forum brought together approximately 30 professionals—including Project Managers, Estimators, Sales Representatives, Service Managers, and other industry leaders—who share a passion for learning, collaboration, and continuous improvement. Attendees engaged in dynamic panel discussions and interactive breakout sessions focused on sharing best practices, tackling common challenges, and generating innovative ideas. The event fostered a strong sense of community among professionals facing similar day-to-day realities, making it a valuable and energizing experience for all involved.

"This is by far the most potent form of training available. No course, nor curriculum could equal and the value it has created is immeasurable," said David Rose of Harvey W. Hottel.

To kick off our meeting, we had Kathy Crosby with us, President and Owner of C2 Consulting, Inc. C2 Consulting is a firm that provides financial, safety, and other consulting services and training, where she focused on Small Project Management with our group. The highlights of her presentation included The Project Life Cycle and Zero-Cost Change Order she introduced. During the breakout session after her material, attendees focused on discussing what are the reasons for warranty calls/rework and how they can be reduced, how scope creep is controlled, and how to reduce non-billable hours.

"The information gained from this forum will be instrumental in shaping a new small projects division as we transition it to our service group at Air Controls," stated Chris Stokes.

After a successful first day featuring an inspiring guest speaker and meaningful member discussions, attendees returned for the final day eager to build on the momentum and bring the conference to a strong close. We began with Exequiel Lopez of Environmental Systems Inc, Jake Chowdry of Intech Mechanical and Jake Emerson of Service Unlimited sharing their turnover processes for small projects. Another highlight of day two included panel discussions, which focused on getting the right people on the right projects and keeping customers while retaining margin.

"The best part of the meeting was really just being able to have unfiltered conversations with people in my industry that are not direct competitors," shared Jerome Ryan with Robert Gibb & Sons. Lastly, we had Jared Krieg with Wiegmann Associates, Chris Stokes with Air Controls, and Matthew Thornton with A&G Services who presented on Close Out- discussing how once the job is completed who is responsible for follow up on warranty, startup and O&M's. Jared Krieg then wrapped up the meeting with quoting work with subcontractors, presenting tips and tricks on each of the things that are crucial when working with subcontractors.

"If I didn't attend the meeting, I would have missed the collaboration with people who hold similar roles as me, and as a result I come back with the tweaks that I can make to get better individually and as a department," said Jake Emerson with Service Unlimited.

The 2025 Small/Special Projects Forum concluded on a high note as members gathered for a lively and well-deserved closing dinner at Texas de Brazil. Our time together in Fort Worth was not only productive, but also filled with meaningful conversations, shared insights, and a lot of fun along the way.



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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

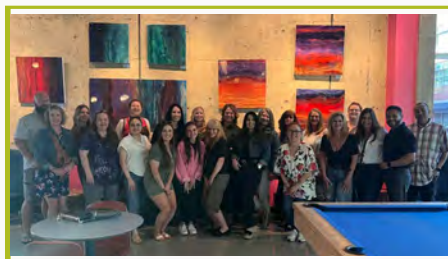
To build a national network of independent mechanical contractors dedicated to providing our customers with the best quality service in the HVAC/R industry.

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



2025 Human Resources Forum Highlights



Fort Worth, TX— Our Human Resources Forum returned to Fort Worth, bringing together industry leaders and professionals to explore emerging trends, best practices, and solutions shaping the future of human resources.

"Some experiences leave you speechless- in the best way possible. Grateful for moments that remind me of the power of connection, shared journeys, and the lessons that shape us. Humbled, re-energized, and deeply thankful for this experience," said Mendi Arnold of Cullum Mechanical.

We started off strong with a panel discussion on Hiring Processes & Onboarding, covering standard procedures and interview practices for new employees. Pam Miske with EES Facility Services and Kristen Swanson & Melinda Friedlander with VHV Company then shared their insights and experience with Coaching & Leadership Training for their employees. To wrap up the first half of the day we had Internal HR versus External Third Parties Panel—exploring the pros, cons, and best practices for each approach.

Rita Swegheimer from Standard Plumbing & Heating shared, "I get so much from the open discussions and appreciate that there are no boundaries with this group."

Later in the afternoon we had Spencer Mainka join us, an Employment Law Attorney at Pham Harrison, who led an informal discussion on debunking common employment law myths and addressing recent federal-level changes that may impact businesses.

"Hearing from Human Resource professionals in the same industry who struggle with the same challenges make you feel less alone. It's also valuable to learn about ways to improve and implement new ideas you've seen in action," stated Madison Wright of Blauch Brothers.

Following an exciting opening day, attendees reconvened for the final day motivated to carry the energy forward and conclude the conference on a high note. We began with Becca Aven as our guest speaker, a Licensed Professional Counselor and Certified Clinical Anxiety Treatment Professional. She covered topics including managing stress in the workplace, strategies for conducting difficult yet productive conversations, avoiding burnout, addressing the "man-up stigma" around mental health and keeping teams/employees excited about a culture of growth.

Attendees then broke into groups to discuss their takeaways from Becca's presentation. Some highlights included stress is not initially a bad thing and the body is designed to respond to stress/anxiety in a way that uniquely helps us stay safe and work through challenges. When managed and navigated in healthy ways, stress and certain stressors can set you up in ways that help you, challenge you, grow you and strengthen you.

We concluded with a few more presentations from attendees. Sonja Antrillo of Legacy Mechanical and Rita Swegheimer of Standard Plumbing & Heating spoke about their Termination Processes. Madison Wright of Blauch Brothers showed the group the benefits of AcuMax, which is an assessment tool they use during the hiring process. AcuMax helps confirm they are putting the right person in the right role where they will thrive.

"The breakouts always bring value. Top level leaders discussing how to lead our teams to success, happiness & fulfillment lifts the spirit in us all," said Frank Quintanar of J&J Air Conditioning.

Capping off an engaging few days in Fort Worth, the 2025 Human Resources Forum ended with an evening of great food, laughter, and connection at Mi Cocina. From start to finish, the forum offered a dynamic mix of collaboration, learning, and community, leaving participants inspired for what's next.

Become a Member



"This is by far the most potent form of training available. No course, nor curriculum could equal and the value it has created is immeasurable."

**-David Rose
Harvey W. Hottel, Inc.**



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**2025 Small/Special Projects
Forum**



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2025 HUMAN RESOURCES FORUM

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– MENDI ARNOLD
CULLUM MECHANICAL

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www.culluminc.com



Stacy Shiflet of Blauch Brothers Inc. has been honored with the Joe Quigley Memorial Chapter Award by CFMA



VHV Company at Back the Trades VT Skills Expo- The VHV Company team headed to Vermont State University– Castleton for the Bring Back the Trades VT Skills Expo! They loved connecting with students from all over Vermont and sharing their passion for the trades— HVAC, sheet metal, and plumbing. It was an exciting opportunity to help inspire the next generation of skilled professionals!