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Upcoming Training Schedule

Visit TheUnifiedGroup.com to register.

2025 Small/Special Projects Forum

April 9 - 12
Fort Worth, TX

2025 Human Resources Forum

May 18-21
Fort Worth, TX

2025 Construction Forum

September 24-27
Boston, MA

* Tour of Environmental Systems, Inc.

2025 Safety Forum

October 19-22
Denver, CO

2025 Design/Build Forum

November 16-19
Denver, CO

2025 Service Management Forum

January 21-24
Fort Worth, TX

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 or (708) 356-5072.

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The Unified Connection

Join as a Member



2025 Service Management Forum Highlights



Charleston, SC- Our first meeting of 2025, the Service Management Forum, was a great success, with over 40 attendees joining us. Everyone came ready to share, learn, and progress together. The event fostered meaningful discussions, setting a strong foundation for the year ahead.

"This was my first time at this forum, and I have learned so much! As an introvert, it's comforting to work within small teams and switch up throughout the day. It's interesting to see that we have similar struggles between different companies regardless of how big or small and very comforting to see others willing to help," stated Stacey Tejeda from Environmental Systems, Inc.

To roll out our first day of meetings, we had our guest speaker, Matt Phillips, a Leadership and Mental Toughness Coach. Matt engaged the group, focusing on equipping them to navigate challenges with confidence and resilience. His interactive program included three trainings: Intro to Mental Toughness and defining it, Build Your Stand, and Unleash Your Routines. To get started, tables discussed how they would define someone who is "Mentally Tough" and what type of people or group they think of and why. Sharing these across the room gave others different perspectives on what it means to them. Attendees then had the chance to write out their own stand, which was brainstorming behaviors, principles, and values that drive their day-to-day decision making. He had attendees form groups that will keep in touch to hold each other accountable to get their personal goals on track. The second half of the day was spent having members share about KPI's and Goal Setting and a panel discussion on Creating a High-Performance Culture.

"Matt's workshop was exhilarating! Being on a mental and physical self-improvement journey for the past two years, I especially enjoyed the 'Ethos, Build Your Stand' section of the Mental Toughness program," said Chris Stokes of Air Controls. "This exercise helped us define who we are, allowing us to show up as our best selves for others. It provided a meaningful roadmap and a sense of purpose, making every day more intentional and fulfilled!"

The last day of our meeting consisted of a mix of member shares, panel discussions, and a best idea implemented. We had three members presenting on Technician Authority: Angela Bedard with Environmental Systems, Inc., Jeff Forbes with Standard Plumbing & Heating, and Frank Quintanar with J&J Air Conditioning. Another highlight was JD Triplett from Cox-Powell Corporation sharing his Best Idea, Cox-Powell's CARE (Customer Assurance Review Evaluation) Service® Preventative Maintenance plan, which they use to make sure that their customers are being taken care of.

"As someone new to the HVAC industry, I've already gained a wealth of knowledge that will help me grow in this field. The discussions, networking, and overall energy of this group have been fantastic," said Maya Taylor from Service Unlimited.



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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



Member Success Story



After attending The Unified Group's 2024 Sales Forum and learning about the potential of backflow testing from Clayton Wood at Legacy Mechanical and TJ Brown at Johnson & Jordan, Ryan O'Hara at Service Unlimited saw an opportunity to expand their offerings.

Recognizing the demand for backflow prevention services, Ryan took action and successfully integrated this into Service Unlimited's business model.

Service Unlimited achieved success through effective market entry and on-site engagement. They launched a targeted campaign by sending email blasts to all existing customers, informing them of their new backflow prevention services. The emails included a direct link to the company website for more information. Additionally, they updated all email signatures to promote this new service offering. Service Unlimited's technicians were trained to document any existing backflow preventers while performing routine preventative maintenance (PM) visits. This documentation has been pivotal in ensuring that all backflow systems are properly tracked and included in ongoing PM services.

One of the company's most significant victories came with a private school client: \$5,840 from certifying existing backflow systems, with potential for additional repairs in the future. \$140,797 in new backflow system installations and a \$10,255 addendum to their existing PM contract, ensuring continued service.

Service Unlimited quickly realized that backflow systems are essential at every site and in almost all buildings, particularly in the state of Delaware, where backflow prevention is required by law. With one technician already certified and a second currently undergoing training, Service Unlimited has positioned itself to capitalize on this market. This success story highlights how a new service offering, inspired by the presentation at The Unified Groups' Sales Forum, opened doors to increased revenue opportunities. What once seemed like a small addition to their portfolio has turned into a valuable revenue stream that they might have overlooked without the guidance from Clayton Wood and TJ Brown.

2024 CONSTRUCTION FORUM

"THERE WERE SEVERAL THINGS I ENJOYED ABOUT THIS FORUM. I THINK THAT THE MOST ENJOYABLE AND BENEFICIAL ASPECT WAS LISTENING TO OTHER CONTRACTORS FROM ALL OVER DISCUSS THEIR ISSUES, WINS, AND FAILURES."
-TOM MILLS, FREIJE ENGINEERED SOLUTIONS COMPANY



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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."



TOGETHER WE MAKE THE DIFFERENCE



"There was such a wealth of knowledge from this group. The willingness to share great processes and experiences was next level."

-Jeff Forbes
Standard Plumbing & Heating

2025 Service Management
Forum



Environmental Systems, Inc. recognized as one of
The Boston Globe's 2024 Top Places to work

