

Become an HVAC Industry Leader:
**5 Steps to Heat Up
Your Business**



Introduction

When it comes to businesses enjoying a surge in demand, heating, ventilation, and air conditioning (HVAC) is definitely, pun intended, a hot industry. Consider, for instance, that the HVAC industry held steady, even as the construction sector took a heavy hit from the economic recession. From 2009 to 2014, revenues in HVAC grew an average rate of 2.4 percent a year, while revenues for housing construction fell to record lows, according to [an article by ACHR News](#), which summarizes findings from [IBIS World](#).

Now that the housing market is bouncing back — and construction is gaining strength — HVAC is primed to grow more. “As more homes and commercial structures are built, and require HVAC system installations in turn, demand for industry installers and technicians will increase strongly,” ACHR reports. The demand is expected to last through the end of the decade.

But this news comes with some pressure. To grow your business, you have to keep up with constantly changing technologies. You need to find, train, and retain capable installers and technicians, stay up to date on the latest building and environmental regulations — all while delivering efficient, high-performance solutions that your customers have come to expect. This eBook offers five steps to help your company get ahead in the HVAC industry.

Designed with owners and operators of small to mid-size HVAC businesses in mind, the steps are practical and budget-friendly — and ultimately can help you grow your bottom line.



Step 1: Stay on Top of Trends in Energy Efficiency

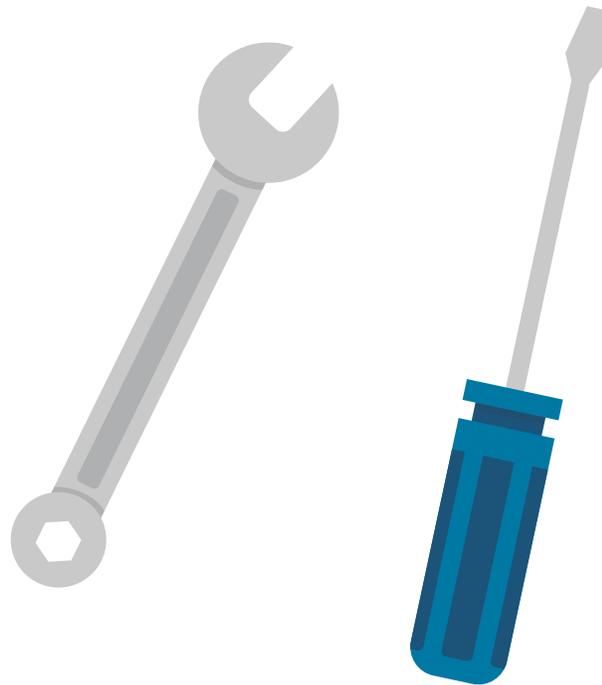
Going green is more than a catchphrase these days. The boom in alternative energy sources, roofs boasting solar panels or gardens, and the push for Leadership in Energy and Environmental Design (LEED) certification make understanding energy efficiency and environmental impact a requirement for an HVAC business. This affects everything from building materials and power sources to refrigerant types and heat sources.

For newly constructed buildings, LEED certification is an increasingly sought-after designation. [LEED-certified buildings](#) are designed and built in ways that save natural resources, use clean renewable energy, and create a healthier environment for the occupants.

When the time comes to select and install an HVAC system in a LEED building, clients look for natural refrigerants, programmable thermostats and humidistats, and similar innovations.

Other tools that are helping HVAC go green include:

- On-command hot water re-circulators
- Thermally driven air conditioning
- Ice-powered air conditioners
- Dual fuel and geothermal heat pumps
- Energy analysis software



Resources and tools

If you find yourself involved in a LEED project, the U.S. Small Business Administration (SBA) can help project managers, techs, and clients understand what's involved in [green building \(and heating and cooling\) projects](#). The SBA's website offers several resources, including:

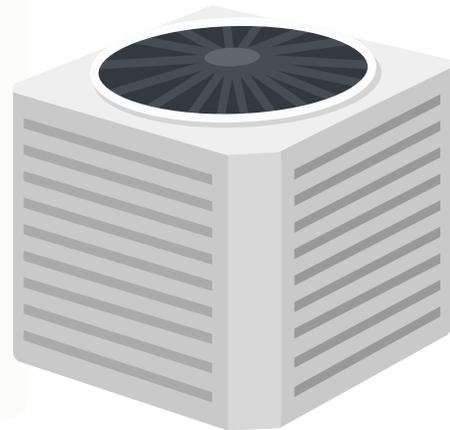


- Guides and resources from the U.S. Department of Energy and the Environmental Protection Agency
- [Information about popular HVAC efficiency upgrades](#) like Energy Star certified equipment
- A [calculator for determining the energy savings](#) of Energy Star AC systems, furnaces, and dehumidifiers
- A learning center with searchable information on complementary improvements in other aspects of construction, such as super-insulating building shells and ductwork, energy-efficient lighting and windows, and other products and strategies for reducing the heating and cooling loads of commercial buildings and homes

Beyond government resources, there are technological tools helping companies stay on top of energy trends. [Mobile apps](#), for instance, can make it easier to track how well an HVAC system meets energy efficiency standards, or stay on top of routine tasks like maintenance. Some come in the form of detailed [checklists](#), much like paper checklists but accessible from your smartphone or tablet and created for specific projects.

Did you know?

HVAC systems can do a lot curb energy use. But, did you know that something as simple as painting a shingle roof white can reduce summer roof surface temperature by as much as 80 degrees? This step alone can cut cooling bills by 10 percent or more.

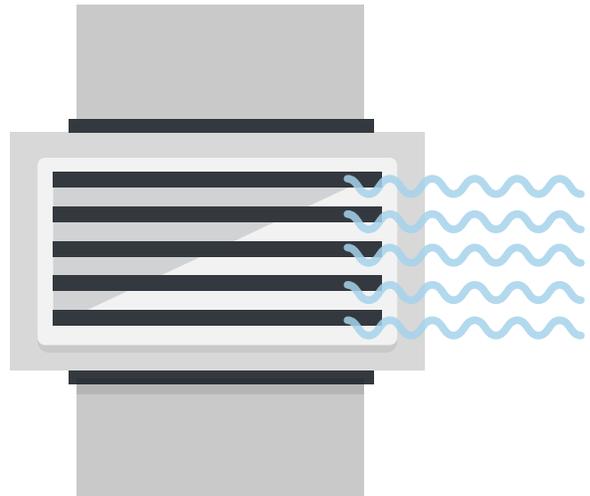


Step 2: Keep Up With Evolving Compliance Regulations

Sure, you have plenty to do managing your business, from haggling with suppliers to keeping customers happy. Yet, you also have to keep up with OSHA requirements. These ever-evolving requirements can be challenging to track, so making a habit out of checking up on the [latest OSHA HVAC news](#) is a must.

From proper handling of ammonia-based refrigerants to preventing Legionnaires' disease, HVAC-related regulations can go beyond the safety and installation standards expected in a construction or renovation project. In addition to meeting OSHA's general safety and health provisions, (e.g., personal protective equipment, fire prevention, scaffolding specifications), remember that HVAC professionals are required to adhere to [indoor air quality standards](#) adopted by your state. [As the EPA explains](#), these can include:

- Ventilation
- Air distribution and filtration
- Moisture and humidity control

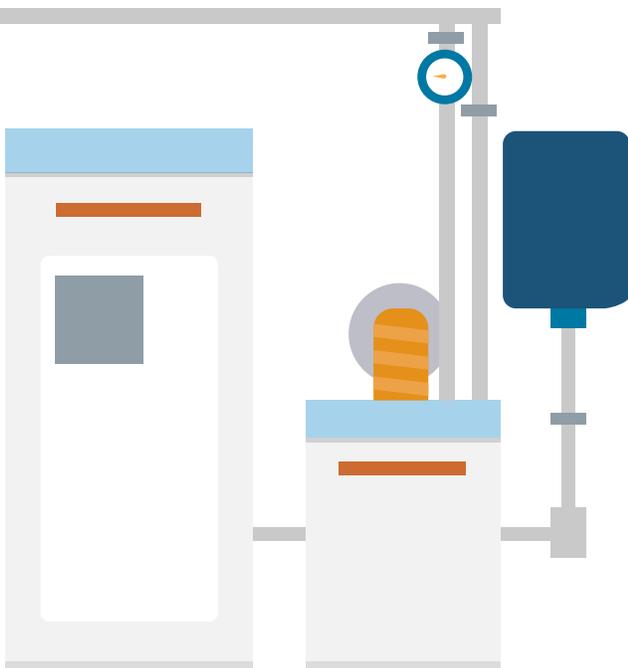


Even if you think you're being diligent, don't assume a regulation that has been in place for decades won't ever change. A growing body of research on indoor air quality, energy efficiency, and environmental impact has increased the understanding of both energy use and building occupant health – and has led to new priorities and regulations that you can't ignore.

For example, in March 2015 the EPA announced the release of new and approved refrigerants to replace ozone-depleting substances with climate-friendly alternatives. “The approved substitutes have GWPs [global warming potentials] that range from 3 to 675 and can replace older compounds with GWPs between 1400 and 4000,” the [EPA’s release](#) states. The EPA maintains a [list of approved and phased out refrigerants](#) as part of its Significant New Alternatives Policy (SNAP) Program, and encourages anyone in the HVAC industry to review it regularly to stay on top of the changes.

Likewise, in 2014 the U.S. Department of Energy (DOE) altered some of its [regulations for air conditioning systems](#). The changes relate specifically to the installation of “through-the-wall central air conditioners” and “through-the-wall central air conditioning heat pumps” – and were put in place to improve energy efficiency. If your company installs these systems, make sure you understand the new regulations and train your team to follow the installation guidelines.

Overlooking updated regulations can cost you in delays, project restarts, penalty fees, and even the loss of business due to an irate customer. In many ways, you can’t afford to make compliance and keeping up with regulations an afterthought.



Step 3: Streamline Operations and Make Your Business Efficient

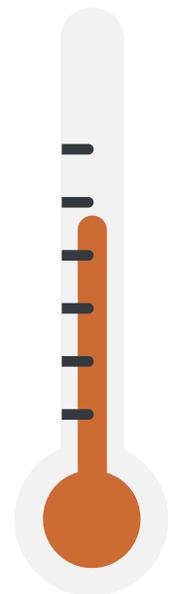
Whether you manage a modest family business or have dozens of techs and installers on staff, your responsibilities involve everything from standard HVAC services to billing and business development. You have to maintain distributor and supplier relationships, maintain company equipment and vehicles, and ensure your staff is up to date on professional training and certifications. You also have to stay on top of licensing and issues relating to your insurance policies.

With so many responsibilities on your plate, operational efficiency is critical — and requires a lot more than returning phone calls or keeping track of who's out to lunch.

Today, advances in technology can help HVAC business operators take command of and coordinate diverse demands like marketing, job dispatching, OSHA compliance, and customer billing. Technology is the ingredient that sets the exceptional HVAC company apart from the merely capable.

How, exactly, does technology help? “The right technology can increase efficiency, save money and reduce waste,” [an article](#) from the North American Precip Syndicate explains. “Productivity solutions are evolving to provide easy access at any time, through any device. They allow users to stay connected anywhere and retrieve important documents as needed, without interruption.” More companies are equipping personnel with smartphones and tablets, using specialized mobile apps allowing employees to access client files, coordinate service calls, share data, and plan and implement marketing campaigns based on acquired business intelligence.

For HVAC companies, these tools can especially improve things like [work order management and job dispatching efficiency](#). Improving these areas translates directly to customer satisfaction, and ultimately customer retention.



Step 4: Exceed Customer Expectations

You've heard the cliché: the best customer is a repeat customer. You keep a customer coming back by providing a positive, value-added experience. Your sales team, techs, and installers give the first-impression of your business. They meet with customers face-to-face, earning the trust it takes to close a deal, and interacting with them, sometimes on a daily basis, for installations, maintenance calls, or emergency service.

Your field staff needs to know the [importance of a positive first impression](#). Showing up on time for scheduled appointments is a given. But even the most technically competent professionals can overlook something as basic as clean uniforms and vehicles, and crisp personal presentations.

Insist that everyone on your team has a professional appearance that matches their professional ability. Combine presentation with an ability to communicate in a clear, friendly manner to customers, and you're bound to see customer experience ratings soar.

Go the extra mile

The key to consistent customer satisfaction is a team that shares your dedication to customer service. It's as good for long-term business as it is for building your reputation. If a tech takes some extra time, for example, to really explain how a repair was made, he or she has the opportunity to follow up with a quick pitch about why routine maintenance would have probably saved a lot of trouble and expense. Selling a service package just makes sense right then and there – and may bring in extra billings when delivered by a courteous professional.



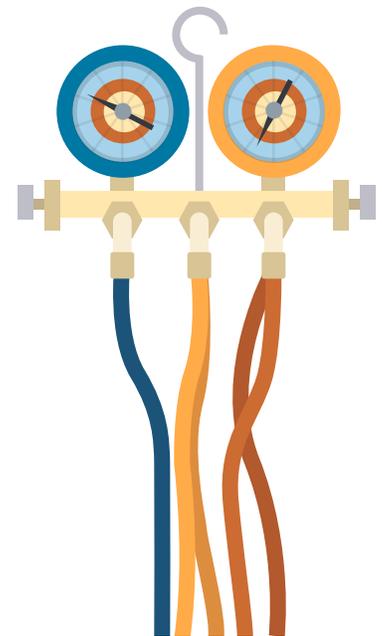
Put another way, a staff trained to go the extra mile is an unbeatable way to build revenue. [Recent research even suggests](#) that strong customer satisfaction is responsible for increasing revenue in many industries by as much as \$1 billion. Realize your company's true potential by [making improved customer service a priority](#).

Beyond a verbal commitment

To reap benefits, you have to do more than just say you're committed to customer satisfaction. You have to find out what your customers actually think of your work and team. How can you get this information? Sure, you can call customers and ask, but people are busy – and don't usually want interruptions during the day.

A more thorough and professional approach is to conduct a customer satisfaction survey. While many HVAC companies send surveys one or two weeks after the service, the best time to get feedback from customers is when the job is fresh on their minds – right after your techs wrap up.

Equipping your techs with mobile devices and apps can make that possible, and allow you, the owner or operator, to receive feedback in real-time. For instance, this [mobile customer satisfaction survey](#) is tailor-made for the HVAC industry. It can give you valuable, timely insight on how well your team performed its job. If the service was sub-par, you want to know that sooner rather than later. With mobile surveys like this, you can see the responses before your techs even pull out of the driveway or parking lot.

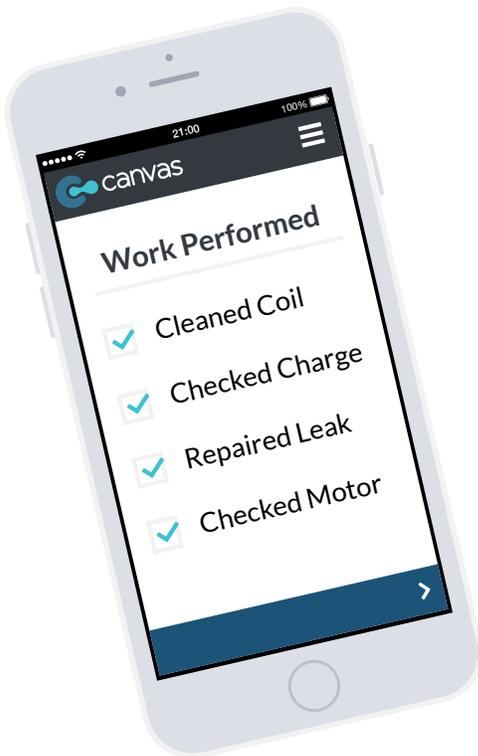


Step 5: Modernize Your Business

Heating and air conditioning companies have been around, well, since heating and air conditioning units. While innovations in heating and cooling have transformed the climate control and comfort industry by light-years, too many of today's businesses operate using yesterday's business management practices.

If you're one of them, how can you catch up?

One of the simplest, most practical steps is to start using mobile communication and interaction. Most of your staff probably already own mobile devices like smartphones or tablets, so training will be minimal. And your team will be able to achieve what wasn't possible before. As the company ARISTA put it in a [blog post about HVAC](#), there are several areas where mobile technology just makes it easier to get the job done right. These include:



1. Faster access to customer service history
2. Ability to check and cross-check parts inventory
3. Improved work-order accuracy
4. Secure mobile payment processing
5. Reliable monitoring of techs in the field
6. Immediate feedback from customers

How can you get started?

The transition is not as difficult or expensive as you might expect. Plenty of mobile apps are on the market to help small to mid-size business owners, but a better place to start is with mobile apps developed [especially for the HVAC industry](#). These apps can help you streamline industry-specific tasks like load calculation, system configuration, system check-and-charge, parts lookup and ordering, and more. They also let techs take payment on the spot.

By giving your team the ability to perform these tasks at their fingertips (instead of back at the office), you're improving your team's accuracy, speeding up orders, and slashing turnaround time – all of which translates to the ability to serve more customers with more consistency and satisfaction.

Unlike some technologies, which are costly and cumbersome to learn and implement, mobile apps are easy and affordable to put in place. At Canvas, for instance, we can turn your existing paper forms into mobile apps – or you can do it yourself in a few short steps.

You don't have to do it all at once. Just select the work orders, reports, or checklists you use most often. Then see how [going paperless](#) saves time and trouble, and puts you well on your way to a modern workplace.

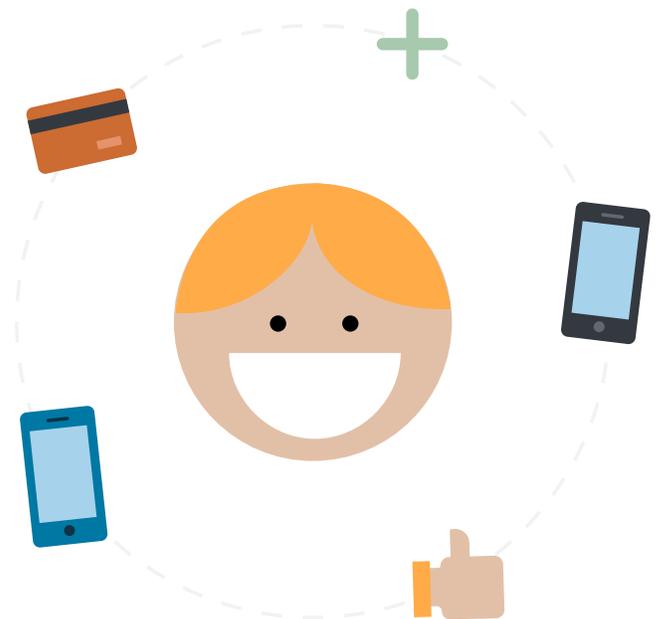


Stand Out as an HVAC Leader

The five steps outlined here might sound straightforward and sensible. After all, prioritizing customer satisfaction has always been a business objective. And happy customers are the result of competent professionals who deliver standout service.

Though exceptional customer service is essential, reaching the next level in HVAC requires more. It takes:

- A commitment to compliance, and being among the first to know when regulations shift
- Streamlining your operations and improving efficiency
- Empowering your workforce with mobile communication, data access, and billing
- Keeping up with the latest HVAC trends and innovations





As the owner or operator of an HVAC company, the time to move your business to the head of the pack is now. The HVAC industry has remained strong and steady, even during the economic downturn. As the economy rebounds, an industry seemingly immune to recession is bracing itself for an even more demanding workload.

There is the potential for plenty of work for today's HVAC contractors, and lasting success for those who can stand apart with exceptional, modern service and performance. With the right combination of tools, technology, and training, your company can secure just that.

Canvas is ready to help you grow your business to the top. We offer more [than 500 mobile applications](#) that specifically help HVAC operators and pros stay on top of OSHA requirements, improve system designs, manage customer data, coordinate personnel in the field, and more. Browse or customize any of our existing apps. In only a few minutes, create your own custom apps based on your existing paper forms.

Or just send us your forms, and we can convert them into apps for you.

[Try it Free!](#)