



Curriculum 2009

Higher Learning. Higher Earning.

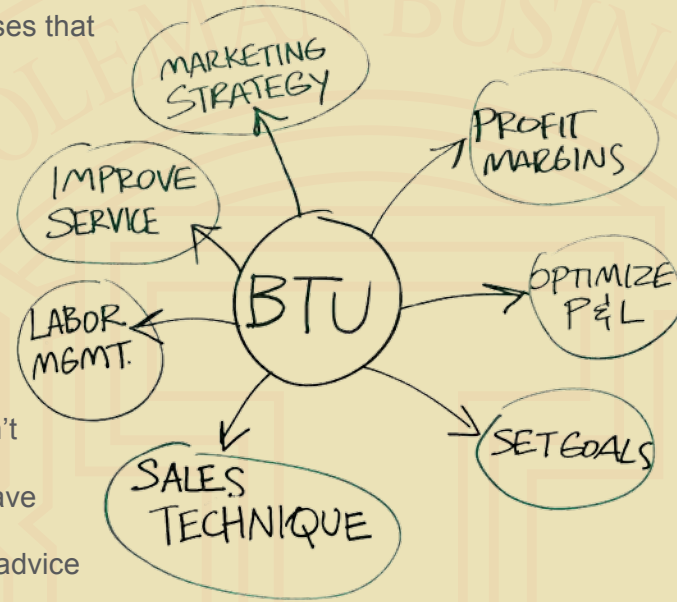
You want to be independent, profitable and successful.

We want to help. Welcome to Coleman's Business Training University.



“Even at my age, I recognize the need to change. I can aspire to reach peak performance.” — S. Toni, BTU grad

Who said you have to figure everything out by yourself? Coleman’s Business Training University is here to help with classes that show you how to work smarter, not harder. And if you think that means long, boring classes with nothing but number-crunching, think again. BTU classes are one-day courses that meet in an easy, relaxed atmosphere. It’s information you can truly profit from, taught by our industry’s most successful business owners. Bring your company’s own paperwork or come only with an open mind, but don’t miss out. Thousands of contractors have already benefited from the real-world advice and education BTU offers. Talk to your Distributor today to reserve your place. Then prepare to learn and earn like never before.



“Great class—very good information—super instructor.” —W. Davis



Mark Matteson
President, Pinnacle Service Group

As president of a management consulting and professional sales training organization, Matteson has authored numerous business articles and two books, including the best-selling “Freedom From Fear.”



Richard Harshaw
President, Lodestar Consulting Systems

A financial and management consultant, Harshaw is a frequent contributor to trade publications with specialized knowledge of the HVAC industry that has benefited contractors throughout the United States.



Gary Elekes
President, EPC Inc.

Gary Elekes operates three HVAC contracting companies. He has implemented top-performing operations models for contracting companies and researched industry benchmarks for leading companies at the retail level.



Dr. Ron Collier
President, Collier Consulting Group

Dr. Ron Collier, president of Collier Consulting Group, is a leading HVAC consultant. His group provides business development instruction, accounting services, consulting, software and other products for all sizes of HVAC businesses.



Tom Piscitelli
President, Applied Learning Associates, Inc.

Tom’s proven sales training seminars help dealer and wholesaler sales persons increase their confidence and competence by creating effective, win-win relationships with their clients.

“Great overall class. It was fine-tuned and detail-oriented.” —Pacific Air

BTU Training Program

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“Excellent class ... great business tools.”
—Phil Collins, Collins Air

Financial Series

Are you making as much money as you possibly can?

Class 1

Understanding the Financial Statement

Learn how to get the accurate numbers you need to manage and grow effectively.

- What to plan for: If you can, bring P&L statements, balance sheets or charts of accounts, and you can go hands-on as the class progresses.
- What you walk away with: You'll be able to restructure accounts and produce monthly P&L statements that will make a difference to your business.

Approved instructors: Harshaw, Elekes, Collier

Class 2

Budgeting Cash Flow

Learn accurate budgeting and forecasting of cash flow that can benefit your overall operations.

- What to plan for: If you can, bring P&L statements from the last three years, a year-to-date balance sheet or P&L and monthly sales volume.
- What you walk away with: You'll be able to create budgets and yearly cash flow forecasts so you know what to expect and what to plan for.

Approved instructors: Harshaw, Elekes, Collier

Class 3

Profit Centers

Separate your company into departments, and determine which areas are truly profitable.

- What to plan for: If possible, bring last year's P&L, a chart of accounts and your year-to-date P&L.
- What you walk away with: You'll know how to departmentalize your P&L and know where your company is making money, where it's losing money and where to make adjustments.

Approved instructors: Harshaw, Elekes, Collier

From reading financial

statements to forecasting

future growth, this

series is designed to help

you identify your true

profit sources. Where are

you making money?

Where are you losing it?

You might be surprised to

find out, but this course

will help lay the

foundation for tracking

your most profitable and

unprofitable activities.

The result: You'll be able

to model your business

after some of the

biggest success stories

in our industry.

Pricing Series

How to make money on all the jobs you're bidding on

Class 1

Add-On Replacement Pricing for Margins

Increase cash flow and invest for future growth by pursuing the right pricing strategy.

- What to plan for: If you can, bring your current pricing strategies and rate schedules.
- What you walk away with: You'll be able to develop a defined pricing strategy in all segments, build an add-on replacement cookbook, implement flat-rate pricing and more.

Approved instructors: Harshaw, Elekes, Collier

What are the advantages

and disadvantages of

your pricing system?

Whether it's flat rate,

cookbook or engineered

jobs, this series

can give you answers.

Plus you'll gain insight

into pricing strategies and

ideal profit percentage

levels for all departments

of your business.

Operations Series

Work smarter, not harder

Class 1

Service Department Profitability

Turn your service department into a profit center, capture more service calls and maintain proper service standards.

- What to plan for: If possible, bring an organizational chart of your service department, all service forms, inventory lists — including service truck stock and warehouse service stock — and your service department P&L (or company P&L).
- What you walk away with: You'll be able to develop an effective department organizational chart, utilize proper service forms, implement an inventory system and establish a department P&L.

Approved instructors: Harshaw, Elekes, Collier

Class 2

Material, Fleet & Inventory Management

Improve productivity and profits with an efficient system to manage material replenishment, fleet and inventory.

- What to plan for: If you can, bring your current purchase order system and material requisition system.
- What you walk away with: You'll know how to develop a system for technician accountability and inventory maintenance.

Approved instructors: Elekes, Collier

Class 3

Customer Service Excellence

Achieve truly superior customer service by developing a service focus and implementing core values throughout all operations.

- What you walk away with: You'll have the ability to write a professional, personalized phone script, develop a secret shopper process, determine behaviors that support core values and implement a customer service follow-up plan.

Approved instructors: Matteson, Harshaw, Elekes, Collier

This series focuses on the day-to-day details of running a successful

contracting business. The

highlight: how to set up

and run a profitable

service department,

including inventory and

fleet management.

And what you learn here

doesn't stay here.

We help you implement

a customer service

culture throughout your

company, one that

values teamwork and

fosters profitability.

Sales & Marketing Series

Generating leads and making the most out of them

Class 1

Selling Service Agreements

Learn to create a service agreement structure for profitable growth and quality lead generation.

- What to plan for: If you can, bring your current service agreement example and forms, technician training manual, technician marketing collateral, plus promo and marketing materials for your service department.
- What you walk away with: The ability to revise or produce proper service agreement forms, develop marketing materials to support program and develop a compensation plan to support the service agreement program.

Approved instructors: Matteson, Harshaw, Elekes, Collier

Class 2

Retail Sales

Establish a sales process for pricing, positioning and selling higher-margin products and gain insight into the 13 SEER mandate.

- What to plan for: If you can, bring your current selling tools, load calculations methods, proposal and agreement forms or current presentation.
- What you walk away with: You'll learn to create a credibility book and adapt sales forms to support a retail cookbook.

Approved instructors: Matteson, Harshaw, Elekes, Collier

Class 3

Technician Selling & Training

Develop top-quality technician training for customer service and lead generation.

- What you walk away with: You'll know the most effective use of lead-generation forms and how to best share your learnings with your technicians.

Approved instructors: Matteson, Harshaw, Elekes, Collier

It's a step-by-step survival

guide for competitive

times. Explore the retail

selling process, and

learn how to set up a

thriving maintenance

agreement program and

market it for maximum

appeal. How to

communicate more

effectively with

homeowners. How to

generate and manage

quality leads. How to

prepare for the 13 SEER

mandate. You'll even

examine strategies for

succeeding in the

light commercial arena.

Sales & Marketing Series (continued)

Separating the good leads from the bad

Class 4

Developing a Marketing Plan

Spend ad dollars more effectively, build better ads and get better leads by learning the ins and outs of a proper marketing plan.

- What to plan for: If you can, bring your current marketing budget along with samples of current marketing materials including Yellow Pages ads, and newspaper or radio ads.
- What you walk away with: You'll be able to create a marketing plan, implement a lead budget and tracking system and develop a marketing calendar with a budget.

Approved instructors: Matteson, Elekes, Collier

Class 5

Building a Profitable Light Commercial Business

A step-by-step approach to creating a successful light commercial business.

- What to plan for: If possible and if you have them, bring your commercial maintenance agreement forms and sales binder with proposal forms.

Approved instructors: Matteson, Collier

Organizational Development Series

Finding and keeping quality people

Class 1

Performance-based Pay

Improve employee morale and optimize revenue by developing a performance-based pay system for your workers.

- What to plan for: If possible, bring your compensation plans including bonuses and incentives for all departments, a payroll printout and, if you have it, an organizational chart with role descriptions.
- What you walk away with: You'll be able to create and implement a compensation plan that rewards and motivates all employees.

Approved instructors: Harshaw, Elekes, Collier

Class 2

Ownership Practices

Learn to develop talent and skill among your people so you can inspire others to do what you do.

- What you walk away with: You'll have the background to create a personal development plan.

Approved instructors: Matteson, Harshaw, Elekes, Collier

Class 3

Human Resources Management in Contracting

Organize your management team to efficiently manage hiring, recruiting and training processes.

- What to plan for: If possible, bring employee safety manuals, job applications, performance evaluation forms, your interview questionnaire, job descriptions and exit interview procedures.
- What you walk away with: You'll learn to develop comprehensive forms and effective procedures for all aspects of human resources management.

Approved instructors: Harshaw, Elekes, Collier

Class 4

Succession Planning

Avoid a crisis. Plan for the future with this step-by-step approach to family, employee or outside agent buyout.

- What to plan for: If you can, bring along your spouse, stockholders or successors as well as your P&L, current insurance plan, buy/sell agreement and any estate or trust document.
- What you walk away with: You'll know how to approach your attorney with a succession plan, a will, trust and a buy/sell agreement.

Approved instructors: Matteson, Harshaw, Elekes

This series focuses on an area that's crucial for lasting success— leadership and human resources management. We'll take a look at how to find skilled labor, retain good people and develop dependable employees, all while maximizing labor efficiency. And what about you? We'll even address exit strategies for buy/sell agreements.

