



## Educating the Customer on Value Added Solutions

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Presenters



Rick MacDonald,  
ASCS, CVI



Scot Moritz, ASCS

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Disclaimer

This presentation is not intended to be a comprehensive program covering all aspects of this topic. All technicians are encouraged to read and follow all applicable standards, codes and regulations related to this topic.

- ✓ It is the responsibility of each individual contractor to follow local building codes and licensing requirements and to work safely in accordance with OSHA guidelines.
- ✓ It is the contractor's responsibility to take proper precautions on each project to prevent cross contamination. Always take the health and safety of the building occupants into consideration before you conduct any cleaning procedures.
- ✓ All of the following tips are only general tips. They do not cover every situation and it is your responsibility to adapt these tips to the individual system you are working on.
- ✓ The Instructor is not responsible in any way for the work you perform after viewing this slide show. You are responsible for your own work.
- ✓ The views and opinions following are the instructors opinions and not necessarily the official position of the National Air Duct Cleaners Association.

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What We'll Learn

- Understand the difference between bait and switch tactics vs. upselling solutions per the ACR standard
- Learn about solutions that can add value to customers
- Selling additional solutions
- Q & A

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Educating the Customer on Value Added Solutions

All HVAC cleaning and restoration projects are unique and, in certain circumstances, common sense. Experience, and professional judgment may justify deviation from this Standard. It is the responsibility of the contractor, or others relying on this Standard, to verify on a case-by-case basis, that application of this Standard is appropriate. When in doubt, use caution and seek additional professional guidance. Users of this document assume all risks and liabilities resulting from use of, and reliance upon, this Standard.

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Educating the Customer on Value Added Solutions

- Why are we in the HVAC Inspection, Cleaning and Restoration business?
  - To provide better IAQ?
  - Is it for safety?
  - Is it to lengthen the life span of HVAC systems?
  - Is it to improve air quality for everyone?
  - Is it to provide energy savings for a green environment?
- Is it to Make Money??

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Educating the Customer on Value Added Solutions

- Understand the difference between bait and switch tactics vs. upselling solutions per the ACR standard
- How we and our employees represent ourselves, our company and NADCA.

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Educating the Customer on Value Added Solutions

- Understand the difference between bait and switch tactics vs. upselling solutions per the ACR standard




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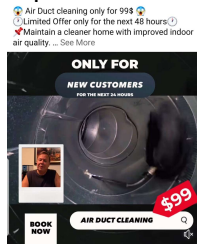
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Educating the Customer on Value Added Solutions

- Understand the difference between bait and switch tactics vs. upselling solutions per the ACR standard




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Educating the Customer on Value Added Solutions

3090A  
**AIR DUCT CLEANING**  
PROFESSIONAL STANDARDS FOR SERVICE

Customer Name: Mr. & Mrs. [unclear]  
 Address: [unclear]  
 City: [unclear] State: [unclear] Zip: [unclear]

Service Date: 09/17/2021  
 Technician: [unclear]

System Type: [unclear]  
 Filter Type: [unclear]

Analysis & General Condition:  
 Pre-Clean: [unclear]  
 Post-Clean: [unclear]

Notes: [unclear]

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Educating the Customer on Value Added Solutions

Analysis & General Condition

Nothing clean system	
Dirt	
Dust	
Carpet Fibers	
Pet Hairs	
Fungus	
Mold	
Insects	
Dust Mites	
Insect Droppings	
Construction Debris	
Nicotine & Tar Buildup	
Grease Buildup	
Rust	
Moisture	
Fiberglass/Asbestos	
Other	

Can you itemize the particulate you find in a duct?

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Educating the Customer on Value Added Solutions

676-23

Customer Name: [unclear]  
 Address: [unclear]  
 City: [unclear] State: [unclear] Zip: [unclear]

Service Date: [unclear]  
 Technician: [unclear]

System Type: [unclear]  
 Filter Type: [unclear]

Analysis & General Condition:  
 Pre-Clean: [unclear]  
 Post-Clean: [unclear]

Notes: [unclear]

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Educating the Customer on Value Added Solutions

• Section 2 – Work Plans

**2.0 Overview:** Prior to the commencement of any cleaning work, the HVAC system cleaning contractor *shall* provide a written work plan. A written work plan is a document that communicates responsibilities and **specific tasks associated with the cleaning and restoration project.** The work plan is based upon information gathered from the HVAC inspection and system assessment.

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• Section 2 – Work Plans

**2.2 Scope of Work:** A scope of work shall be included that clearly identifies which HVAC components are to be cleaned or restored. The scope of work shall also include the environmental engineering controls required for the workspace, and any unique requirements.

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Educating the Customer on Value Added Solutions

• Understand the difference between bait and switch tactics vs. upselling solutions per the ACR standard

• What does your cleaning include?

Cleaning Includes:

- Supply and return main trunks
- Supply and return ducts
- All supply and return vents
- AHU interior & blower
- Evaporator coil (type 1).
- Installation and proper closing of all necessary access openings.

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- What if your client doesn't want the coil cleaned?
  - It can be left out of the scope!
    - Just make sure it is in writing and signed by the client.

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Educating the Customer on Value Added Solutions

- Not only are we providing a valuable service our clients have requested there are additional services or solutions that can add value to customers.
  - These can
    - potentially save money
    - potentially eliminate a hazard
    - potentially further improve their IAQ

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Educating the Customer on Value Added Solutions

- Selling additional solutions
- Commercial or Residential?
  - What are some solutions?
    - Type 2 Coil Cleaning
      - This can be sold as a stand-alone service!!




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**TECHNICAL NADCA CONFERENCE**

Educating the Customer on Value Added Solutions

- Selling additional solutions



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**TECHNICAL NADCA CONFERENCE**

Educating the Customer on Value Added Solutions

- Selling additional solutions
  - What is the cause and possible solution ?



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**TECHNICAL NADCA CONFERENCE**

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- Selling additional solutions
  - Dryer and bath vent cleaning
  - Replacement of vents
  - Bird and rodent protection



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**TECHNICAL  
NADCA  
CONFERENCE**

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- **Selling additional solutions**
  - **Remediation**
    - This may not have been part of the original scope; how will we handle this?



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**TECHNICAL  
NADCA  
CONFERENCE**

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- **Selling additional solutions**
  - **Internal insulation replacement**



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**TECHNICAL  
NADCA  
CONFERENCE**

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- **Selling additional solutions**
  - **Coatings**



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Educating the Customer on Value Added Solutions

- Selling additional solutions
- AHU Restoration




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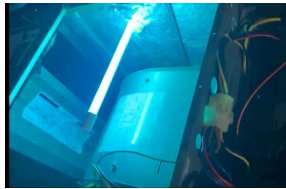
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Educating the Customer on Value Added Solutions

- Selling additional solutions




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Educating the Customer on Value Added Solutions

- Selling additional solutions re-cap
  - Duct Sealing
  - Duct Repairs
  - Duct insulation (exterior wrap)
  - Coatings
  - Replacement
  - Extra cleaning
    - Type 1 or 2 coil
  - Internal insulation replacement
  - Filters
  - AHU Restoration
  - Dryer and bath vent cleaning
    - Vent Replacement
- This is not a complete list of add-on services and is not intended to be. These are ideas to help get you motivated to add value to your company and increase your total revenue.

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Educating the Customer on Value Added Solutions

- **Selling additional solutions and things to consider!**
  - How is upselling done
    - By your tech onsite or do they make recommendations to the client and reference these on the work?
    - Do you have a standard price list?
    - Will onsite sales interfere with the crew's other clients waiting for them?
  - **By someone in the office?**
  - **Is there time to do it now or schedule when time is available**

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Educating the Customer on Value Added Solutions

- **Selling additional solutions and things to consider!**
  - Is there discount to do it now?
  - When will you schedule?
  - How are onsite employees figured into the sales process?

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Educating the Customer on Value Added Solutions

- **This is not a complete list of add-on services and is not intended to be. These are ideas to help get you motivated to add value to your company and increase your total revenue.**

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Educating the Customer on Value Added Solutions

Upselling solutions add value

- Customer
- Company
- Technician




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Educating the Customer on Value Added Solutions

Presenter Contact Information

- Rick MacDonald
- rmac@armstrongne.com
- Cell 603-494-7614

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