



#MDMFullSteamAhead



2024 Mingledorff's Dealer Meeting

Heil Presentation

Bill Hallenberg, General Manager North Alabama

Stuart Criss, Territory Manager North Alabama

Michael Jacobsen, Heil Factory Representative

March 1st, 2024



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ELITE DEALER PROGRAM

Stuart Criss

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CURRENT ELITE DEALERS

AIR MEDIC, LLC

SOUTHERN COMFORT HEATING AND COOLING

MR. DANS PLUMBING HEATING AND AC

SOUTHERN COMFORT SERVICES

A-OK HEATING AND COOLING INC

TIM COTTLE'S HTG AND AIR

AIR OUTLOOK, INC.



ELITE DEALER PROGRAM OVERVIEW

- Designed to provide top Heil dealers with benefits, resources to grow their business
- No signup or annual cost from Heil
- Top prospects are:
 - Driven to grow their business
 - Heil brand champions



ELITE DEALER BENEFITS

Generate and Manage Leads

- Dealer Locator priority ranking
- Credit towards Marketing Materials from AdVantageSM
- Call tracking
- SEO website consultation and audit
- Free MTA360 live chat
- **Four months free of FieldEdge**
- **BxB Media marketing consultation and GLS setup**
- **Free online scheduling on Dealer Locator**

Close The Deal

- Preferred financing from Wells Fargo®
- Additional 2-year No Hassle ReplacementTM warranty
- Online review subscription from ReviewBuzz
- Homeowner marketing materials
- Discounted AIG labor warranty rates

Showcase Your Business

- Social media content
- 10% off Heil and Elite Dealer apparel
- Free website build
- Elite Dealer Awards
- **Third-party review showcase on Dealer Locators**

Grow your business

- Eligibility for Incremental Volume Rebate*
- Invitation to Elite Dealer Meeting
- Free online training on My Learning Center
- Digital welcome kit
- Free HR support from HR Basic
- Up to 50% off of QuickBooks
- 50% co-op for industry membership fees
- Totaline motors for warranty emergencies
- **Three free Zoom Phone lines for one month**
- **Exclusive discounts from Preferred Vendor Program**

Green = New in 2024!

*Must meet additional criteria. See Incremental Rebate Marketing documentation for details.

DIGITAL WELCOME KIT

- Emailed to the dealer's primary contact immediately when the dealer joins the program
- Links to program tools, resources, and benefits
- Fantastic onboarding resource for the program



Additional 2 Year No Hassle Replacement Limited Warranty *



- Two extra years of No Hassle coverage on eligible models
- Homeowner gets a replacement unit if a major component fails during coverage period
- Two extra years added when a product is registered online with the Elite Dealer-CIN Sold To number
- Elite Dealer-CIN Sold To Number is provided in the Elite Dealer welcome email

**Scan for a list
of eligible
products!**



*Covers major components only. See limited warranty certificate for terms and exclusions.

NOTE: Entry-level products do not come with a No Hassle Replacement limited warranty. Full list of products and No Hassle Replacement warranty lengths can be found on Elite Dealer page on GO Sites.

Go Green! Financing Program for Elite Dealers

- Year-round financing buy-downs exclusive to Elite Dealers
- Helps dealers offer high-efficiency equipment with low monthly payment
- Elite Dealers also get lower everyday rates on 15 plans ranging from 6-120 months



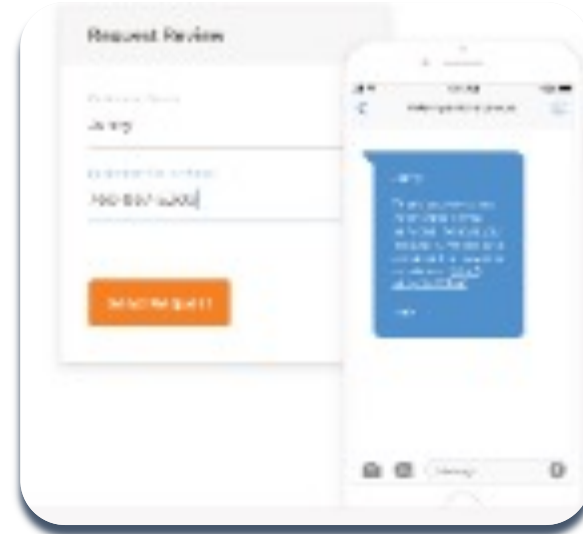
[How financing works](#) | [Application](#) | [Everyday Rates](#) | Paige.Michel@wellsfargo.com

Plan Code	Promotion	Elite Cost	Promo Rate Reduction	Final Elite Cost
1545	No interest if paid in full within 12 months with monthly payments	6.36%	(3.36%)	3.00%
1546	Special rate of 0% APR with 36 months equal monthly payments	15.17%	(5.17%)	10.00%
1547	Special rate of 9.99% APR with 120 equal monthly payments (\$7.5K minimum)	5.25%	(5.25%)	0.00%

ReviewBuzz® ANNUAL SUBSCRIPTION

ReviewBuzz® app

Dealer requests review from phone



BuzzTap

Simply tap badge with phone to review



Google Auto Detection

Get more Google reviews



BuzzCard

Dealer gives customer business card with QR code



BuzzTap Report

Face-to-face requests KPIs



NPS

Service experience insight



- Review generation and management tool
- Learn more at icp-elite.getreviewbuzz.com
- Contact mariah@reviewbuzz.com to get started



CALL TRACKING

- Allows Elite Dealers to gain information on phone calls they receive
- Each Elite Dealer is assigned a call tracking number on the Dealer Locator
- Each Elite Dealer can request additional call tracking numbers for free to track the success of advertising and marketing efforts



FREE WEBSITE BUILD

- Choose from five website templates
- Customize with your offers, products, company history
- Cost 100% covered by Heil in Year 1
- Dealer pays \$250 annually starting in Year 2
- GoHeil.com > Secure Dealer Login > AdVantage Portal > Single Page Website



WHAT THIS MEANS FOR YOU

1

Talk to your distributor rep to see if you are a good fit for the program

2

Take advantage of the program benefits

2

Ensure you are staying compliant with the program



2024 ELITE DEALER MEETING

September 9-11, 2024

**Miami, FL | JW Marriott Miami
Turnberry Resort**

Similar to 2023, but consolidating
general session and awards
ceremony into one evening

Training, awards ceremony,
vendor showcase, general session

Time	Monday	Tuesday	Wednesday	Thursday
Morning		Training Distributor Meeting	Training	Departures
Afternoon			General Session	
Evening	Arrivals Customer on Own	Vendor/Product Showcase	Awards Ceremony	

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NEW ELITE DEALERS QUALIFY!

SIGN UP TODAY!

.....



THANK YOU

.....



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FINANCING PROGRAM AND R454B

Michael Jacobsen

.....

WHY FINANCING?

**“NONE OF MY CUSTOMERS USE FINANCING —
THEY PAY CASH OR USE A CREDIT CARD.”**



**37% of adults wouldn't be
able to cover an unexpected
\$400 expense¹**



**74% of Americans think
installment plans are helpful for
budgeting and alleviating the
stress of making a large purchase²**

¹ Federal Reserve 2022 Economic Well-Being of U.S. Households survey, [Fortune Magazine](#), May 22, 2023

² [lendingUSA](#), August 3, 2023

HOMEOWNER BENEFITS TO FINANCING

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- Give buyers more time to pay for their purchases.
- Monthly payment that fits into the operating budget.
- Customer solves today's problem with tomorrow's dollars.
- Will be able to buy higher efficiency equipment (save on utilities!) and accessories.



FACTORY FINANCING PARTNERS

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1st Look Financing Provider

- Preferred Financing Partner
 - Ongoing & Seasonal Promotions Available



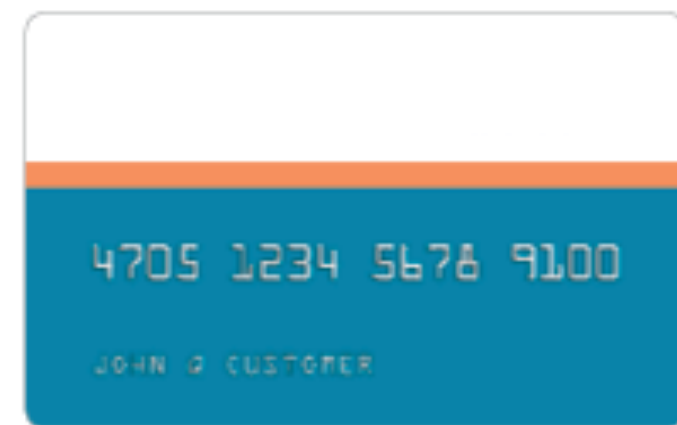
2nd Look Financing Provider

- Ideal for consumers with below average credit scores
- Lease-To-Own Financing
- No Fees for Contractor

WHEN & HOW TO OFFER FINANCING

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Buy today, pay over time
with the ICP credit card*



It's a convenient way to pay for your home comfort system. Your *Comfortmaker* credit card brings you:

- Revolving line of credit that you can use over and over again
- Special financing where available
- Convenient monthly payments to fit your budget
- Easy-to-use online account management and bill payment options

*The credit card is issued with approved credit by Wells Fargo Bank, N.A.

Equal Housing Lender

[Learn More](#)

- **The availability of financing should be an integral part of your dealer's marketing plan.**
 - Offer homeowner credit application through dealer website
 - Include financing in any advertising
 - Mention the availability of financing in the sales call
 - Build into the proposal (total and monthly options)
 - Take advantage of ICP financing promotions

WELLS FARGO FINANCING PLANS

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Price Sheet for ICP® credit card program

ICP Elite, Airquest®, Arcoaire®, Comfortmaker®, Day & Night®, Heil®, KeepRite®, Tempstar®

Effective Date: 09/01/2023

Offered through Wells Fargo Bank, N.A.*



Credit Terms¹

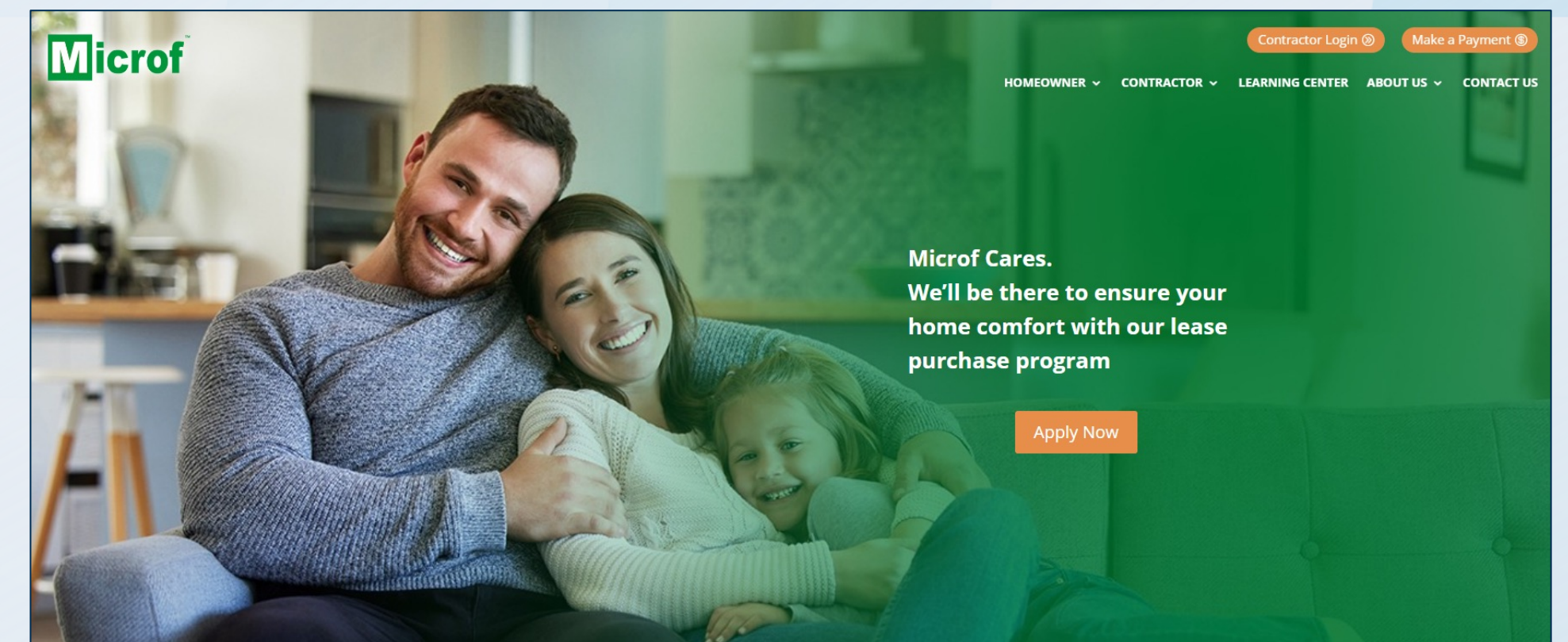
Plan	Special Rate with Custom Monthly Payments	ICP Elite Discount Rate ²	Standard ICP Discount Rate ²
4480	Special rate of 5.99% APR with custom monthly payments of 2.00%	8.71%	9.31%
4481	Special rate of 7.99% APR with custom monthly payments of 2.00%	8.51%	9.11%
4482	Special rate of 9.99% APR with custom monthly payments of 2.00%	6.66%	7.26%
2246	Special rate of 11.00% APR with custom monthly payments of 2.00%	5.36%	5.96%
Special Rate with Equal Monthly Payments			
4079	Special rate of 0% APR with 24 equal monthly payments	12.23%	12.83%
4091	Special rate of 0% APR with 36 equal monthly payments	15.17%	15.77%
4103	Special rate of 0% APR with 48 equal monthly payments	17.82%	18.42%
4115	Special rate of 0% APR with 60 equal monthly payments	20.33%	20.93%
1802	Special rate of 0% APR with 72 equal monthly payments	22.94%	23.54%
Special Rate with Equal Monthly Payments (\$7,500 Minimum)			
3669	Special rate of 9.99% APR with 96 equal monthly payments (1.52% payment factor)	4.25%	4.85%
3670	Special rate of 9.99% APR with 108 equal monthly payments (1.41% payment factor)	4.75%	5.35%
3671	Special rate of 9.99% APR with 120 equal monthly payments (1.33% payment factor)	5.25%	5.85%
No Interest if Paid in Full ³ with Regular Monthly Payments ⁴			
1148	No interest if paid in full within 6 months with regular monthly payments	3.71%	4.31%
1019	No interest if paid in full within 12 months with regular monthly payments	6.36%	6.96%
1066	No interest if paid in full within 18 months with regular monthly payments	8.14%	8.74%
Regular Terms (\$1,000 Maximum)			
9999	Regular Account Terms	0.00%	0.00%

- The everyday pricing sheet provides access to regular terms and special terms promotional plans. Available on HVACpartners.com
- Informational videos available on wellsfargo.com/cardholders
- All products, accessories, and service work can be included
- Cannot charge a separate fee to consumer for financing, must be part of total cost

MICROF

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- **Lease-to-Own option for homeowners with below average credit**
- **Ability to quote monthly payments, not price**
- **Help homeowners with less than perfect credit and insufficient savings**
- **No cost to the contractor**
- **FAST and EASY approval process**

The logo for Microf, featuring a large green 'M' inside a white square, followed by the word 'icrof' in green lowercase letters.

ACTIONABLE STEPS FOR DEALERS

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- Learn more on Wells Fargo and Microf programs on Go Sites under Business Building Tools>Win More Customers In The Home
- Apply for Wells Fargo At Home Link for customers to apply for financing on their website
- Add “Financing Available” to advertising
- Tell homeowners about the ability to apply for financing online when they schedule appointments
- Sell equipment based on monthly payments

Win More Customers in the Home



Pocket Folder

Present yourself in a professional manner with a Tempstar pocket folder. Each folder has two pockets and two business card holders.



Warranty Details

Here are warranty specifics that will convince any homeowner that our brand delivers longer, stronger protection.



Wells Fargo Retail Services Summary

It's important to give your customers financing options with every sales call. Signing up with Wells Fargo Retail Services is quick and easy. Sign up here with Wells Fargo Retail Services.



Microf

Microf is the leading provider of residential lease-purchase solutions to the HVAC industry and is now available to all ICP distributors and contractors. Learn more about how this product offering can help you.

*Press F5 to ensure the most recent file is shown

Current as of 2/2/2024

Preliminary and subject to change.

For distributor planning purposes only.

2025 PIPO Summary - Residential

*Preliminary, subject to change.

			2023			2024												2025											
Type	ICP Program Description	ICP	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Heat Pump	Single Stage	(C,H,T)5H6S, N5H5S, R5H5S																											
	Two Stage	(C,H,T)5H7T, N5H7T																											
	22 SEER2 Ion VS**	(C,H,T)5H2V**																											
	5-Stage Replacement	(C,H,T)5H0V***																											
Fan Coil	Entry / Mid / Deluxe	FHMA5 / FTMA5 / FCMA5																											
	Multi-Family Wall	FMA5L, FMA5X																											
	Multi-Family Ceiling	FM(C,U)5X, FM(C,U)5Z																											
AC	South AC	(C,H,T)5A6S, N5A5S, R5A5S																											
	North AC	N5A4S, R5A4S																											
	Two Stage	(C,H,T)5A7T, N5A7T																											
	5-Stage Replacement	(C,H,T)5A1V																											
Evap Coils	Evaporator Coils (A, V, Slab)	EAM5X, EAA5X, EVD5X, EVM5X, ESH5X																											
	Dissipation Replacement Components																												
	*Replacement Coil, Uncased Coil																												
SPP 3 yr. sell thru	Entry G-Chassis	PHB4, PDB4, PGB4, PAB4																											
	MH-Chassis	PAM4, PHM4																											
	Mid G-Chassis	PHB5, PGB5																											
Geothermal	Ion Series 3-Htg. & 2 Clg.	HC																											
	Performance Variable speed	HB																											
	Quiet comfort single stage	HP																											
	Performance 2-Stg. split	HS																											
	Quiet comfort single stage split	HW																											

Product Data

Pricing Avail./
New Orders
Open

First Ship New

Last Call

Forecasts Due
MF FC Last Call

* Last call for R-410A Condensing units. For R-410A Coils/fan coils, these will be last time orders before line transitions to "made to order" status with longer lead times.
**Last time order for R-410A MF Fan coils manufactured in 2024 before shifting to "made to order" status with longer lead times.

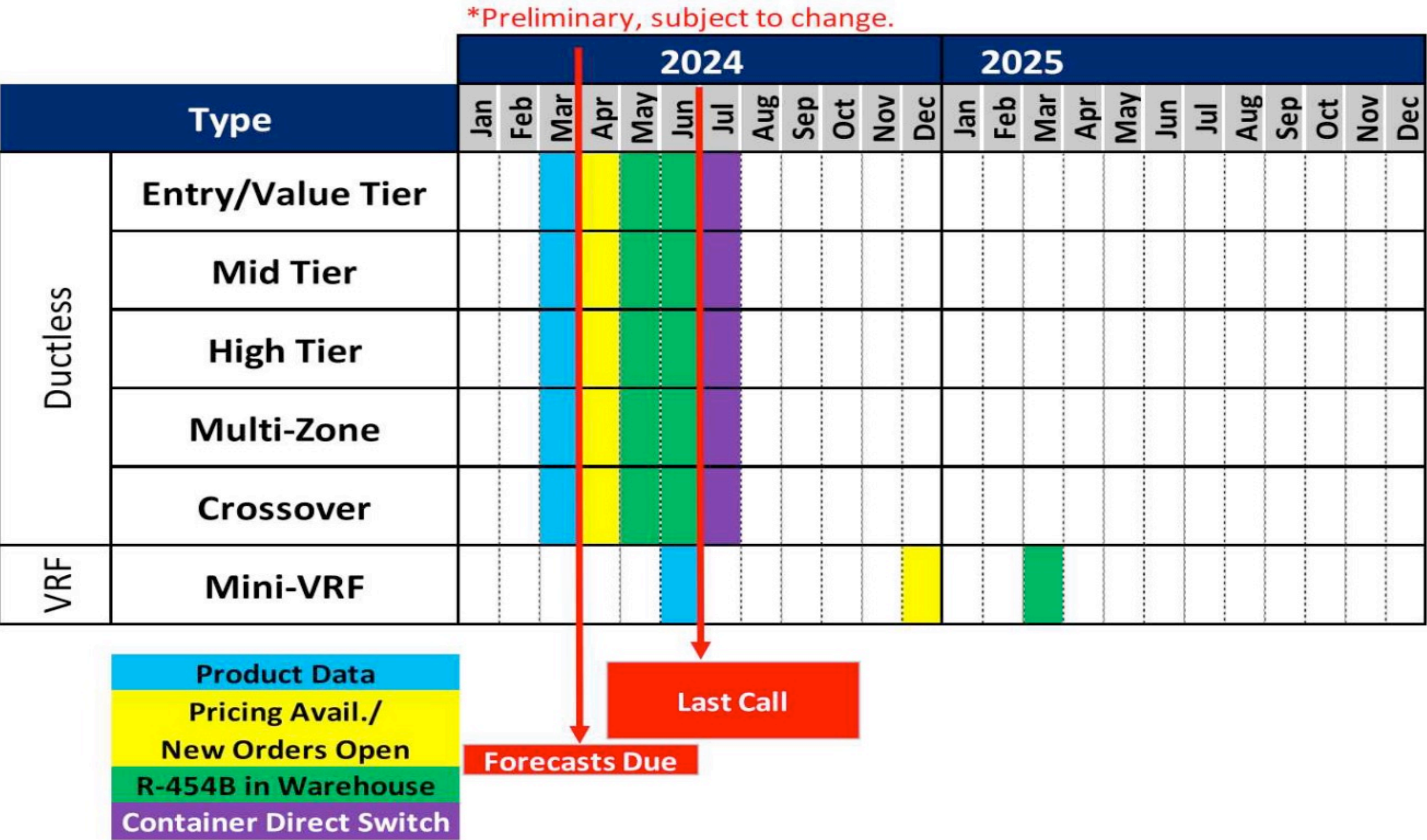


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Current as of 2/2/2024
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2025 PIPO Summary – DLS / VRF



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Sales Mastery and Propose and Close

Presented by Bill Hallenberg

General Manager of North Alabama





2024 HVAC Sales Mastery

***A PROVEN
SALES PROCESS!***

HVAC
Sales Mastery

4-DAY
WORKSHOP





Features and Benefits

- Individual attention - Instructors provide individual attention to help you hone and sharpen communication skills and language that inspires homeowners to buy now!
- Real world training - You will receive tools and templates that help tell your story and help increase sales as soon as you return to the office.
- Get comfortable - You will gain confidence in using the sales process. HVAC Sales Mastery® is identifying and using opportunities to master the process of HVAC sales.
- You WILL see your mix climb and your profits grow!

You will learn:

- Sales strengths and Weaknesses
- Industry opportunities
- HVAC sales process overview
- HVAC sales process team member roles
- Comfort Survey
- DISC profile
- Sales communication
- Communicating with clients
- Sales presentation overview





EVENT ID: 41573
DATE: March 18 - 21, 2024
TIME: 8:00 AM - 4:00 PM CDT
LOCATION: Mingledorff's Birmingham
516 31st St N
Birmingham, AL 35203 US
CONTACT: Carolyn Griffith
(cgriffith@mingledorffs.com)



PRESENTER:
Rob Rusniaczek





Recently Added!

We will be holding a Sales mastery Refresh for individuals that have previously completed the four-day course on Feb 20th -21st at the Mingledorff's Birmingham location.





PROPOSE AND CLOSE





Your Total Investment \$296/MO* \$22,354 *WITH APPROVED CREDIT  Your Net Investment \$22,354 Financing Details: Min. 1.50% payment 9.99% APR Payment based on 120 months HEIL HVH836GKA <u>Brochure</u> -QuietComfort Deluxe -Variable Speed -Heat Pump -10 Yrs Parts -No Hassle Replacement 10 Years -Registered within 90 Days -Original Owner -No Hassle Applies to Condensor Only HEIL FCM4X3600AL <u>Brochure</u> -Main Line -Variable Speed -Air Handler -10 Yrs Parts -No Hassle Replacement 10 Years -Registered within 90 Days	Your Total Investment \$267/MO* \$20,172 *WITH APPROVED CREDIT  Your Net Investment \$20,172 Financing Details: Min. 1.50% payment 9.99% APR Payment based on 120 months HEIL HCH636GKA <u>Brochure</u> -QuietComfort Deluxe -Two-Stage -Heat Pump Condensor -10 Yrs Parts -No Hassle Replacement 10 Years -Registered within 90 Days -Original Owner -No Hassle Applies to Condensor Only HEIL FVM4X3600BL <u>Brochure</u> -Air Handler -Energy Efficient -Variable Speed ECM Motor -10 Yrs Parts -No Hassle Replacement 10 Years	Your Total Investment \$265/MO* \$17,412 *WITH APPROVED CREDIT  Your Net Investment \$17,412 Financing Details: Min. 1.50% payment 9.99% APR Payment based on 96 months HEIL H4H5S36AKAAA <u>Brochure</u> -H4H5S Series -Heat Pump -Single-Stage HEIL FJMA4X36L0BB -Performance Compact -Air Handler -Multi-Speed Tutco FC-2601C10LC -Auxiliary Heater Ecobee EB-STATE3LTP-02 <u>Brochure</u> -Wi-Fi -Programmable -7 Days Program -5 Year Warranty	Your Total Investment \$314/MO* \$18,817 *WITH APPROVED CREDIT  Your Net Investment \$18,817 Financing Details: Min. 1.50% payment 0% APR Payment based on 60 months HEIL N4H5S36AKAAA <u>Brochure</u> -N4H5S Series -Heat Pump -Single-Stage HEIL FJMA4X36L0BB -Performance Compact -Air Handler -Multi-Speed Tutco FC-2601C10LC -Auxiliary Heater Ecobee EB-STATE3LTP-02 <u>Brochure</u> -Wi-Fi -Programmable -7 Days Program -5 Year Warranty 1 YEAR LABOR WARRANTY
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- Easy to understand financing terms
- Total investment for the cash customer
- Full Equipment Explanations
- Color Brochures
- Signable online proposal so homeowner can decide at the kitchen table.
- Fully customizable including colors, quality level names, included services, terms and conditions
- Actual pictures of the units to be installed



HEIL BRAND AWARDS



HEIL MAINLINE LEADERSHIP AWARD WINNERS

Company

A-Ok Heating and Cooling

Air Outlook Inc.

Mr. Dans Plumbing, Heating & Cooling

Air Medic, LLC

Macky Tucker Heating & Cooling

City, State

Florence, AL

Huntsville, AL

Eastaboga, AL

Anniston, AL

Athens, AL



TOP MAINLINE DEALER

Southern Comfort Services







THANK
YOU!



FULL STEAM AHEAD

2024 MINGLEDORFF'S DEALER MEETING