

Dealer Training 2026 Contracting Edge

TRACK 1

Financial Management Series:

Class 1

Understanding Financial Statements

Course Objective:

The goal of this class is to have dealers to understand how to get accurate and timely financial numbers so their companies can grow without losing control.

Topics Covered:

- Chart of Accounts
- Balance Sheet
- P&L Statements
- Ratios
- Departmentalization to the GP Line

What to Bring (Dealers)

- Profit & Loss Statement
- Balance Sheet
- Chart of Accounts

What to Bring

- Financial Statements – Income Statement and Balance Sheet last 2 years

Follow up Homework:

- Restructure Chart of Accounts
- Produce Monthly P&L
- Calculate Financial Ratios

A Laptop with Microsoft Office (EXCEL, WORD) is suggested as a learning tool, but not required. The class contains materials on CD, electronic files, and supporting forms that will help implementation.

TRACK 1

Pricing Series:

Class 1

Contractor Pricing For Profitability

Course Objective:

To get dealers pricing properly to produce acceptable gross margins and increase cash flow and investment in future growth.

Topics Covered:

- Job Costing
- Utilizing Menu Based Pricing
- Why using GP \$ per man-day
- KPI's in Contracting – The Benchmarks
- Flat Rate Implementation
- Define Pricing in all Segments
 - Service
 - RNC
 - Service
 - Maintenance

What to Bring (Dealers):

- Current Pricing Strategies and Rate Schedules in all Segments
- Understanding of Pricing Templates

Follow up Homework:

- Develop a Defined Pricing Strategy in all Segments
- Build Cookbook
- Apply GP \$ per-man day Benchmarks
- Implement Flat Rate Pricing

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TRACK 1

Operations Series:

Class 1

Service Department Profitability

Course Objective:

To get the service department to become a profit center, capture more service calls, and maintain proper service levels

Topics Covered:

- Service Organizational Chart
- Proper Forms to Support Department
- Parts Stock Replenishment
- Procedure and Policy Manual
- Dispatching Procedures
- Service Pricing Strategies
- The “Perfect Service Call” Procedure”

What to Bring (Dealers):

- Org. Chart of Service Department
- All Service Forms
- Inventory Lists
 - Service Truck Stock
 - Warehouse Service Stock
 - Maintenance Stock
- Service Department P&L (or company P&L if not departmentalized)

What to Bring (TMs):

- Pre-assigned articles on Service Department Structure
- Determination to help dealer implement changes in Service Department

Follow up Homework:

- Develop Org. chart for Service Department and Procedure Manual
- Utilize Proper Forms to Support Service Department
- Implement Inventory Replenishment System
- Establish Service Department P&L
- Understanding of Service Department KPIs

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TRACK 1

Operations Series Class 2 Materials, Fleet & Inventory Management

Course Objective:

To get the dealer on efficient material replenishment, fleet and inventory management system to improve productivity and profits

Topics Covered:

- Field Accountability
- Inventory for 85% first time completion rate
- GPS Technology
- Electronic Invoicing
- Purchasing Procedures
- Fleet Practices

What to Bring (Dealers):

- Current Purchase Order System
- Current Material Requisition System

What to Bring (TMs):

- Understanding of your Dealer's Buying Patterns
- Articles downloaded from EPL
- Implementation Plan to help your Dealer manage inventory

Follow up Homework:

- Develop a system for Technician Accountability
- Maintain Inventory to Support 85% of better 1st time completion rate

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TRACK 1

Operations Series Class 3 Customer Service Excellence

Course Objective:

To develop a customer service focused culture and implement core values to support superior customer service in all operations.

Topics covered:

- Developing a customer service culture
- Implementation of core values in all areas
- Phone/telemarketing professionalism
- Debriefing technicians and homeowners
- Proper paperwork
- Rewarding positive behavior
- Sales support from customer service reps.
- Implementing customer service follow up plan

What to Bring (Dealers & TMs):

- An open mind to new ideas for serving customers

Follow up Homework:

- Write a personalized telephone script
- Develop a secret shopper process
- Write behaviors to support core values
- Implement a customer service follow up plan

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TRACK 1

Sales & Marketing Series

Class 1 Selling Service Agreements

Course Objective:

Create a service agreement structure that sets the stage for controlled profitable growth and generate quality leads.

Topics Covered:

- How to implement a successful service agreement program
- Marketing materials
- Compensation plans
- Goal setting
- Marketing techniques
- Pricing
- Company culture to support plan

What to Bring (Dealers):

- Current service agreement example and forms (if applicable)
- Technician training manual
- Technician marketing collateral
- Promo and marketing materials for service department

What to Bring (TMs):

- Pre-assigned EPL articles on how to implement service agreement plans and price strategies
- Willingness to train technicians in role-play scenarios

Follow up Homework:

- Revise or produce proper service agreement forms
- Develop marketing materials to support program
- Develop compensation plan to support service agreement program
- Understanding and communicating goals

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TRACK 1

Sales & Marketing Class 2 **Retail Sales-- In Home Selling**

Course Objective:

Establish a sales process that will allow the dealer to sell higher margin products that are priced properly and sold based on positioning and options. A focus is given to understanding the impact of the 13 SEER mandate.

Topics Covered:

- Retail Selling Techniques
- Presentation
- Homeowner call
- Credibility book
- Proposal and agreement forms
- Load calculation

What to bring (Dealer):

- Selling tools
- Load calculation methods
- Proposal and agreement forms
- Current presentation
- Comfort advisor training manual from EPL
- Sales Process article from EPL

What to bring (TM):

- Comfort advisor training manual from EPL
- Sales Process article from EPL

Follow up Homework:

- Create a credibility book
- Adapt sales forms to support a retail cookbook strategy

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TRACK 1

Sales & Marketing Class 3

Technician Selling & Training

Course Objective:

To put a system in place that will get service technician training to a level that where the service technician will provide exceptional customer service and create quality leads.

Audience:

Service technicians, service managers, and customer service representatives

Topics Covered:

- Lead coordination and turnover
- Service toolbox for first time completion
- Technical training curriculum
- The role of the technician
- Changing beliefs of the service technician's responsibilities

What to bring (Dealer):

- Open mind and positive attitude

What to bring (TM):

- Willingness to discuss technician award systems with management

Follow up Homework:

- Proper use of lead generation forms
- TM to work with technicians on implementation of principles taught in class

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TRACK 2

Sales & Marketing Class 4

Developing a Marketing Plan

Course Objective:

To help dealers understand the need for a marketing plan, marketing calendar, lead forecast and sales forecast and how to create quality leads. This class will also focus on developing better ads, use of financing, yellow pages and advertising as a whole.

Topics Covered:

- Lead tracking systems
- Marketing calendar
- Advertising tactics
- Marketing programs
- Distributor marketing programs

What to bring (Dealer):

- Samples of current marketing materials
- Yellow Page, newspaper and radio ads being used
- Marketing budget

What to bring (TM):

- Understanding of the distributor marketing programs

Follow up homework:

- Implement a lead tracking system
- Develop a marketing budget
- Develop a marketing calendar
- Revise materials to support marketing plan
- Build a lead budget and tracking program

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TRACK 2

Sales & Marketing Class 5 **Building a Profitable Light Commercial Business**

Course Objective:

Implement the steps necessary to create a successful light commercial business

Topics Covered:

- Estimating
- Prospecting/Qualifying customers
- Project management
- Codes, regulations, and legal issues
- Leasing and financing options
- Life Cycle costs
- Commercial service agreements
- Closing
- Service after the sale

What to bring (Dealers)

- Commercial maintenance agreement forms
- Sales binder and proposal form

What to bring (TM):

- Willingness to help dealer implement closure rate tracking system

Follow up Homework:

- Implement a commercial maintenance agreement program
- Determine the account manager role and job description
- Develop a commercial needs analysis and building audit system
- Build a closure rate tracking system

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TRACK 2

Organizational Development Series:

Class 1

Performance Based Pay

Course Objective:

Show the dealer how performance based pay can improve employee moral, increase pay and at the same time improve revenues and profits for the company.

Topics Covered:

- Understand the structure of performance based pay
- Why Do It
- Pay plans
- Steps for implementing
- Dealing with Culture change
- Accounting practices
- Compliance with labor laws

What to bring (Dealer):

- Compensation plan for all departments
- Payroll printout
- Current incentive and bonus plans
- Role descriptions
- Organizational chart of company

What to bring (TM):

- Willingness to help dealer implement performance based pay with proper forms and materials
- Ability to discuss culture change with management

Follow up homework:

Develop Performance based pay for all employees

A Laptop with Microsoft Office (EXCEL, WORD) is suggested as a learning tool, but not required. The class contains materials on CD, electronic files, and supporting forms that will help implementation.

TRACK 2

Financial Series Class 2 Budgeting & Cash Flow

Course Objective:

Dealers to understand the importance budgeting and forecasting cash flow have on their overall operations.

Topics Covered:

- Creating a 12 Month Budget
- Understanding Cash Flow
- Basics of Forecasting

What to Bring (Dealers):

- Last 3 years P&L (if available)
- YTD Balance Sheet
- YTD P&L
- Monthly sales volume for each month
- Financial articles downloaded from EPL

What to Bring (TMs):

- Determination to help dealers follow up with homework assignments

Follow up Homework:

- Create a Budget
- Cash Flow Forecast for the next 12 Months sent back to instructor

A Laptop with Microsoft Office (EXCEL, WORD) is suggested as a learning tool, but not required. The class contains materials on CD, electronic files, and supporting forms that will help implementation.

TRACK 2

Financial Series Class 3 Profit Centers & Departmentalization

Course Objective:

Dealers to understand how separating their company into different departments will help them determine what areas are making money or losing money and make the necessary adjustments.

Topics Covered:

- Departmentalizing all areas of Contracting
- Building and Supporting a Structured P&L
- Applying Overhead to the proper Centers
- Key Performance Indicators
- Reporting
- Financial Safeguards

What to Bring (Dealers):

- Prior Year P&L
- Chart of Accounts
- YTD P&L

What to Bring (TMs):

- Financial articles downloaded from EPL
- Determination to help Dealers complete homework assignments

Follow up Homework:

- Send Instructor a sample of departmentalized P&L
- Examples of forms used to support profit centers sent to instructor
- Examples of Activity Codes defined sent to instructor

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TRACK 2

Organizational Development Class 2 Ownership Practices

Course Objective:

Company leaders to understand how to best grow their people and that productivity is based on how you get others to do what you use to do.

Topics Covered:

- Employee development
- Building trust
- Leadership practices
- Producing productivity
- Personal development and skill level

What to bring (Dealer):

- Read the E-Myth Contractor by Michael Gerber
- Read Pre-assigned EPL articles on leadership practices

What to bring (TM):

- Same as dealer

Follow up homework:

- Additional reading supplied by in class
- Develop a personal development plan

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TRACK 2

Organizational Development Class 3

Human Resource Management in Contracting

Course Objective:

To help the company management team get organized and structured in hiring, recruiting and training practices.

Topics covered:

- Employee manual
- Safety manual
- Performance review and feedback
- Compensation systems
- Interviewing and hiring
- Recruiting
- Role descriptions

What to bring (Dealer):

- Employee, safety, and compensation manuals
- Job application forms
- Performance appraisal
- Training plan
- Recruiting plan
- Interview questionnaire
- Job descriptions
- Exit interview procedures

What to bring (TM):

- Pre-assigned EPL articles

Follow up homework:

Develop the forms and procedures to support all the topics covered

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TRACK 2

Organizational Development Class 4 Succession Planning

Course Objective:

Get the dealer focused on the need to have proper succession steps in place to deal with a family buy-out, employee buy-out or outside agent buy-out and avoid a crisis situation.

Topics Covered:

- Buy/Sell agreements
- Will & trust
- Structuring the business
- Mentoring a successor
- Key employee insurance
- Valuing the enterprise
- Family Estate Planning

What to bring (Dealer)

- Spouse, stockholders, successors to attend
- P&L or balance sheet
- Information on current insurance plans
- Buy/Sell agreement
- Rules on forming a proprietorship or corporation
- Estate or trust document

What to bring (TM):

- Pre-assigned EPL articles
- Willingness to help dealer stay focused on 20 year fast forward view

Follow up homework:

- Meet with attorney to establish the final succession plan
- Establish buy/sell agreement
- Develop the will and trust

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