



DEALER DEVELOPMENT

2023 - 2024



ABOUT US

A coaching & training company born from an HVAC company

Back in 2013, we began coaching other HVAC dealers who were going through similar struggles as we did. As a result of these impromptu coaching sessions, GroundWork Consulting was established.

Running a contracting business can often feel like navigating a maze, where every turn presents new challenges and obstacles. We understand the feeling of being trapped in a corner, searching for an escape route, or an easy button. Just like you, we've walked that path and faced similar struggles.

That's why we established GroundWork Consulting – to be the guiding light that helps contractors break free from the constraints and find their way to success. With our support, you can navigate the maze with confidence, overcome challenges, and pave your own path to a thriving business.

We offer a structured program with easy to implement steps for owners and their teams, building long-term relationships without any binding commitments.

We're dedicated to showing you the "how" and "why" behind each step, fostering independence while assisting with continuous growth.

**WE ARE YOUR DEDICATED
IMPLEMENTATION EXPERTS**

TWO PATHS FORWARD

Unlock your full potential with our training and coaching programs



TRAINING

Our comprehensive training programs are tailored for both seasoned professionals and those new to the industry.

Our trainers bring real-world insights from their own experiences in the HVAC industry.

Interactive sessions, with minimal lecture and a focus on practical application ensure an engaging learning experience. You will not be bored!

We hold nothing back. We are 100% committed to giving you ALL the insights and resources you'll need to make an immediate impact on your business by implementing what you learn.



COACHING

Our process-driven coaching helps businesses grow by providing expertise in bookkeeping, administration, management, pricing, marketing, and more.

Our coaches tailor growth plans, addressing immediate needs while fostering a comfortable and supportive environment.

We serve as a trusted resource for business-related questions. Our goal is to empower clients to achieve growth while creating a fun and challenging atmosphere.

We are here to listen, guide, and provide the help needed for success.





GROUNDWORK TRAINING **1-DAY BUSINESS PLANNING WORKSHOP**

Master a proven process to drive your long-term success

In this immersive and interactive workshop, you'll learn proven strategies and techniques to take your business to new heights.

Our expert facilitators will guide you through the essentials of developing a comprehensive business plan tailored specifically for your company. From market analysis and financial projections to marketing and operational strategies, you'll gain invaluable insights to drive growth and profitability.

This workshop is designed for business owners, managers, and anyone on your team looking to enhance their business acumen. You'll be able to network with industry peers and gain practical knowledge that will set you apart in our increasingly competitive market.

WHO SHOULD ATTEND?

Owners

Spouses

Managers

Territory Managers



UNDERSTAND THE PRESENT

Analyze the current company and identify opportunities for growth.



CREATE A FUTURE VISION

Develop a clearly defined, compelling vision that motivates the entire team, defines the company's purpose, and establishes a strong culture.



LEAVE WITH A PLAN

Setting SMART individual and team goals, identifying necessary resources, and establishing performance metrics to ensure accountability.

2-DAY PROFITABLE PRICING & COMPETITIVE COMPENSATION

Pricing, compensation, and success strategies for growth

As prices continue rising and the labor pool continues shrinking, proper pricing and compensation are even more critical components of business success. This session will deliver invaluable insights and proven strategies to maximize profits, eliminate competitors, and elevate employee engagement.

Discover effective pricing techniques to cover costs, stand out in the market, and attract loyal customers. Learn how to design compensation structures that motivate your team and align with business objectives, fostering performance and satisfaction.

We'll focus on achieving financial stability by mastering pricing strategies for sustainable growth, optimizing profitability, and cultivating a highly motivated team that drives success.

WHO SHOULD ATTEND?

Owners

Managers

Territory Managers



KNOW YOUR NUMBERS

Understanding revenue, COGS, Gross Profit, & Net profit and their impact on proper pricing



KNOW YOUR PEOPLE

Recruiting, compensating, and retaining the right employees.



PRICE FOR PROFITABILITY

Leave with an implementation plan for pricing install, service, and maintenance with the margins required to hire and retain the best employees





GROUNDWORK TRAINING **2-DAY ADMIN ACCELERATOR**

Streamline office operations and achieve accurate reporting

This comprehensive training program starts by setting up a QuickBooks file and cleaning up any existing financial data. Participants will receive hands-on training on proper entry techniques to ensure data accuracy.

This session will also deep-dive into office and payroll management, month-end processes, and analyzing financial data. You'll gain insights into effectively managing your office operations, optimizing payroll processes, and navigating month-end procedures with ease.

You'll not only streamline your administrative tasks but also achieve accurate and reliable financial reports. Empower your team with the knowledge and expertise needed to efficiently manage your office, strengthen financial control, and drive the success of your business.

WHO SHOULD ATTEND?

Owners

Managers

Bookkeepers

Office Admins

Territory Managers



KNOW YOUR NUMBERS

Understanding the essentials of accounting and bookkeeping in Quickbooks



EFFECTIVE ENTRY

Making sure everything entered is categorized correctly.



EFFECTIVE REPORTING

Understanding and automating the 3 key reports every business should be reviewing regularly

1-DAY PLANNING YOUR PMA PROGRAM

Establish a reliable and consistent revenue and referral stream

Most business owners understand offering planned maintenance to customers delivers recurring income and repeat customers. PMA's are essential to the overall financial health of the business, but few businesses make them a priority.

This class offers a hands-on approach, with interactive sessions, case studies, real-world examples and tactical resources. Participants will have the opportunity to develop and fine-tune every component of their own planned maintenance program.

Break down barriers to implementation using cost-effective strategies, efficient scheduling techniques, and customer retention tactics to drive revenue, enhance customer satisfaction, and consistently grow your planned maintenance program.

WHO SHOULD ATTEND?

Owners

Service Managers

Office Admins

Territory Managers



KNOW YOUR NUMBERS

Understanding what's included in your program and current capacity for PMAs



PROGRAMS & PROCEDURES

Put together a plan for marketing the program and procedures to ensure a consistent customer experience



MAKE IT A TEAM EFFORT

Create a culture of planned maintenance by getting everyone on the team involved in the success and long-term benefits of the program





GROUNDWORK COACHING **QUICKBOOKS OVERHAUL**

Transform your QuickBooks with an expert overhaul

A business is only as good as its books. If your existing QuickBooks file needs work, we can help overhaul your books! We will update the chart of accounts, item list, class list terms list, payment method list, and payroll item list.

Once the overhaul is complete, we can empower your team to keep your data clean with our in-depth training on vendor bill entry, customer invoicing, departmentalization, chart of accounts, and financial statements.

GROUNDWORK COACHING **VIRTUAL BOOKKEEPING**

Save time, money, and frustration with hassle-free bookkeeping

Our team handles recruitment, hiring, training, and employee retention, taking the burden off your office.

Our team of dedicated professionals will get it done right, the first time. Send your vendor bills to our efficient virtual bookkeeping team for seamless data entry. We generate statement-based and invoice-based bill payments per your instructions.

With meticulous data integration into your accounting software, we ensure precise month-end close procedures that consistently deliver accurate financial statements, helping you make better business decisions quickly.



GROUNDWORK COACHING

MAINTENANCE PROGRAM IMPLEMENTATION

Craft a customized comprehensive maintenance program

Your dedicated coach will work with you to define plan offerings, calculate competitive pricing, and devise an effective implementation strategy.

Unlock the potential of advanced invoicing for hassle-free monthly and annual automatic recurring payments. Discover effective marketing strategies to expand your program's customer reach, drive renewals, and increase replacement opportunities.

Online Store Solution:

Eliminate sales friction and make it easy for your customers to do business with you using our custom-built online store, featuring convenient monthly and annual recurring payment options. Empower your customers to effortlessly browse and purchase maintenance services directly from your website, while our automated system handles recurring payments.

Make it easy for technicians to offer planned maintenance on every call with a dedicated app for seamless field operations.





GROUNDWORK COACHING **DISPATCHING SOFTWARE IMPLEMENTATION**

Make sure your team is getting the most out of your software

Embrace the power of new dispatching software, like FieldEdge, and Upfront Pricing integration with QuickBooks, without the overwhelming challenges and steep learning curve that usually comes with learning new software.

Experience a smooth go-live date by giving your entire team dedicated support to maximize their proficiency quickly. Conquer the complexities of change as we make your transition painless and empower your business for success.

GROUNDWORK COACHING **PAYROLL ASSISTANCE**

Save time with seamless payroll management

Process your payroll in-house, complete with departmentalized labor for enhanced insights. Your team submits daily timecards as they would normally, and our professionals efficiently enter them into QuickBooks, then run payroll alongside you.

You'll receive biweekly payroll processing, including SPIFF payments, sales commissions, bonuses, and accurate tracking of paid time off.

Gain a clear understanding of departmental profitability that will help you make business decisions quickly.

GROUNDWORK COACHING **CUSTOM COACHING**

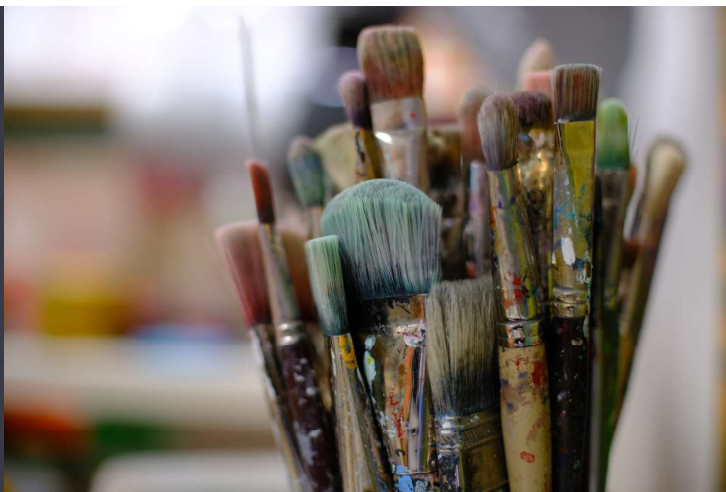
Looking for something different? Let's talk.

Unlike generic coaching approaches, customized programs are tailored specifically to address the unique challenges, goals, and circumstances of individual businesses.

Our team of industry experts have the ability to develop customized programs offering targeted guidance and tailored strategies for growth. Your coaches analyze your specific needs, developing action plans that align with your vision and objectives. Even more importantly, having been "in the trenches", they have the ability to help you avoid costly mistakes, provide accountability, support, and adaptability, ensuring your consistent progress and resilience.

With a focus on long-term success, customized coaching cultivates a growth mindset and equips businesses with the tools to overcome challenges.

Like all of our coaching programs, our customized programs focus on consistently doing things the right way, unlocking your business's potential, driving sustainable growth and improved performance for the long-run.



LET'S GET
STARTED

