



NCI's Roadmap to Implementation

Choose Your Path and Stake Your Claim in Home and HVAC Performance!

1. Get Started:

Turn New Knowledge Into New Services

2. Keep Going:

Turn Your New Services Into Gold



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February 22-26, 2015 • San Diego, California

Over the years, NCI has worked hard on revamping its technical, business, sales, and marketing training offerings in an effort to deliver a complete system to help you become successful performance-based contractors. Along the way we heard your suggestions, especially with regard to how to implement these tools and methods into your everyday business.

During Summit 2015 in San Diego, we will put it all together in the form of an implementation process to help you make Performance-Based Contracting™ a part of your company and your culture.

How does this work? We've created two distinct "paths" toward implementing the disciplines of HVAC Performance and Home Performance. The paths are designed with four "Initial Implementation" and four "Advanced Implementation" sessions that will cover technical, lead generation, sales, and management topics. You'll have the opportunity to pick four of the eight sessions to attend based on what you need in your firm.

In addition we'll have several great general sessions, updates, and plan to share several new member products and services. Including our Keynote speaker: Dr. Denis Waitley!



Check out the schedule below for a full layout of this years Summit! Be sure to plan your days to get the most out of this conference. More detailed information (like rooms numbers) will be available on site. With the beach and the Pacific Ocean right outside, it will be tough to stay focused, we know. But there will be so much going on, and so much impactful information offered, that we know that you'll be able to stake your claim and find the treasure!

SUMMIT 2015 SCHEDULE	
TIME	EVENT
Sunday, February 22	
9:00am - 2:00pm	NCI Annual Golf Outing
4:00pm - 5:30pm	Ask the Coaches - Member & Coaches Roundtable
6:00pm - 8:00pm	Welcome Reception - Sponsored by Goodman Manufacturing
Monday, February 23	
7:30am - 9:15am	Breakfast & Opening Session featuring NCI Chairman, Dominick Guarino
9:30am - 10:45am	Concurrent Breakout Sessions - I
11:00am - 12:15pm	Concurrent Breakout Sessions - II
12:15pm - 2:15pm	Keynote Luncheon Featuring Dr. Denis Waitley
2:30pm - 3:45pm	Concurrent Breakout Sessions - III
4:00pm - 5:00pm	Member Idea Meeting - \$20 Entry Fee
4:00pm - 5:00pm	Guest & New Member Orientation Meeting
6:00pm - 8:00pm	NCI Vendor Partner Tradeshow & Reception
Tuesday, February 24	
9:00am - 10:15am	Concurrent Breakout Sessions - IV
10:30am - 11:30am	NCI's New ComfortMaxx™ 3.1
11:45am - 1:30pm	NCI Vendor Partner Tradeshow & Lunch
1:30pm - 2:45pm	Contractor Panel Discussion - Implementation Challenges & Successes
2:45pm - 3:15pm	Idea Meeting and Tradeshow Contest Winner Announcements
3:15pm - 4:00pm	Closing Session featuring NCI President, Rob Falke
6:00pm - 7:00pm	Member Appreciation Reception
7:00pm - 9:00pm	2015 Awards Banquet and Presentation Ceremony
Wednesday - Thursday, Feb. 25 & 26- Post Conference Training	
8:00am - 5:00pm	Performance-Based Selling (Wed. & Thur.)
	HVAC System Renovation (Wed. & Thur.)
	Advanced Carbon Monoxide Training (Wed. only)
	ComfortMaxx™ Training (Wed. only)

Choose Your Path and Stake Your Claim to Home and HVAC Performance!

As you're planning your journey through Summit 2015, we've established seven schedules or tracks for you to choose from to get the most out of your Summit experience.

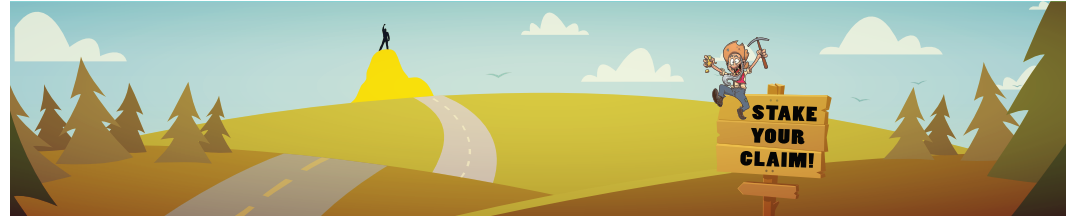
How does this work? We've created two distinct "paths" toward implementing the disciplines of HVAC Performance and Home Performance. The paths are designed with four "Initial Implementation" and four "Advanced Implementation" sessions that will cover technical, lead generation, sales, and management topics. You'll have the opportunity to pick four of the eight sessions to attend based on what's most important to you.

Here are the seven suggested tracks:

If you are most interested in HVAC Performance, your schedule should look like this:	
Monday, February 23	
9:30am - 10:45am: <i>Marbella</i>	HVAC Fundamentals: Go Beyond Your Initial Technical Training With Jeff Sturgeon
11:00am - 12:15pm: <i>Marbella</i>	HVAC Fundamentals: Initial HVAC Performance Lead Generation And Sales With John Garofalo
2:30pm - 3:45pm: <i>Marbella</i>	Advanced HVAC: Maximizing the Impact of Your Training With Rob Falke
Tuesday, February 24	
9:00am - 10:15am: <i>Marbella</i>	Advanced HVAC: Advanced HVAC Lead Generation and Sales With David Holt

If you are most interested in Home Performance, your schedule should look like this:	
Monday, February 23	
9:30am - 10:45am: <i>Portofino</i>	HP Fundamentals: How Do I Begin to Make Money in Home Performance? With John Boylan
11:00am - 12:15pm: <i>Portofino</i>	HP Fundamentals: So I'm Trained in Home Performance. Now What? With David Richardson
2:30pm - 3:45pm: <i>Portofino</i>	Advanced HP: Advanced Home Performance Lead Generation And Sales With David Holt
Tuesday, February 24	
9:00am - 10:15am: <i>Portofino</i>	Advanced HP: Take Your Home Performance Training to the Next Level With David Richardson

If you are most interested in the fundamentals, your schedule should look like this:	
Monday, February 23	
9:30am - 10:45am: <i>Marbella</i>	HVAC Fundamentals: Go Beyond Your Initial Technical Training With Jeff Sturgeon
11:00am - 12:15pm: <i>Marbella</i>	HVAC Fundamentals: Initial HVAC Lead Generation And Sales With John Garofalo
2:30pm - 3:45pm: <i>Las Palmas/Marseilles</i>	HP Fundamentals: How Do I Begin to Make Money in Home Performance? With John Boylan
Tuesday, February 24	
9:00am - 10:15am: <i>Las Palmas/Marseilles</i>	HP Fundamentals: So I'm Trained in Home Performance. Now What? With Scott Johnson



If you are most interested in advanced only, your schedule should look like this:

Monday, February 23	
9:30am - 10:45am: <i>Las Palmas/Marseilles</i>	Advanced HVAC: Maximizing the Impact of Your Training With Rob Falke
11:00am - 12:15pm: <i>Las Palmas/Marseilles</i>	Advanced HVAC: Advanced HVAC Lead Generation and Sales With David Holt
2:30pm - 3:45pm: <i>Portofino</i>	Advanced HP: Advanced Home Performance Lead Generation And Sales With David Holt
Tuesday, February 24	
9:00am - 10:15am: <i>Portofino</i>	Advanced HP: Take Your Home Performance Training to the Next Level With David Richardson

If you are most interested in Advanced HVAC & Initial HP, your schedule should look like this:

Monday, February 23	
9:30am - 10:45am: <i>Las Palmas/Marseilles</i>	Advanced HVAC: Maximizing the Impact of Your Training With Rob Falke
11:00am - 12:15pm: <i>Las Palmas/Marseilles</i>	Advanced HVAC: Advanced HVAC Lead Generation and Sales With David Holt
2:30pm - 3:45pm: <i>Las Palmas/Marseilles</i>	HP Fundamentals: How Do I Begin to Make Money in Home Performance? With John Boylan
Tuesday, February 24	
9:00am - 10:15am: <i>Las Palmas/Marseilles</i>	HP Fundamentals: So I'm Trained in Home Performance. Now What? With Scott Johnson

If you are most interested in technical topics, your schedule should look like this:

Monday, February 23	
9:30am - 10:45am: <i>Marbella</i>	HVAC Fundamentals: Go Beyond Your Initial Technical Training With Jeff Sturgeon
11:00am - 12:15pm: <i>Portofino</i>	HP Fundamentals: So I'm Trained in Home Performance. Now What? With David Richardson
2:30pm - 3:45pm: <i>Marbella</i>	Advanced HVAC: Maximizing the Impact of Your Training With Rob Falke
Tuesday, February 24	
9:00am - 10:15am: <i>Portofino</i>	Advanced HP: Take Your Home Performance Training to the Next Level With David Richardson

If you are most interested in sales topics, your schedule should look like this:

Monday, February 23	
9:30am - 10:45am: <i>Portofino</i>	HP Fundamentals: How Do I Begin to Make Money in Home Performance? With John Boylan
11:00am - 12:15pm: <i>Marbella</i>	HVAC Fundamentals: Initial HVAC Performance Lead Generation And Sales With John Garofalo
2:30pm - 3:45pm: <i>Portofino</i>	Advanced HP: Advanced Home Performance Lead Generation and Sales With David Holt
Tuesday, February 24	
9:00am - 10:15am: <i>Marbella</i>	Advanced HVAC: Advanced HVAC Lead Generation And Sales With David Holt

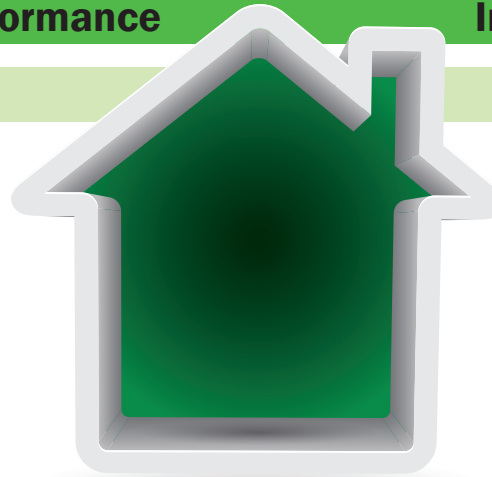
Fundamentals

Go Beyond Your Initial Technical Training

Participants will learn how to leverage the skills learned in NCI Technical Training to begin the diagnostic process and educate customers about the need for further testing to help improve areas that might include safety, health, comfort, and energy efficiency.

Initial HVAC Performance Lead Generation and Sales

Learn how to turn initial HVAC system test results into solid leads and sales opportunities. This includes how you set pricing for basic repairs and techniques to turn those self-generated opportunities into profitable sales. You'll also learn how measuring and sharing basic sales results with the entire team helps build a company culture based on measured-performance in every aspect of your business.



Advanced

Maximize the Impact of Your Training

Contractors who currently have field personnel test and follow up on results will learn how to take it to the next level by building more confidence in your team's ability to perform more advanced diagnostics and develop comprehensive system renovation solutions based on your customer's needs.

Advanced HVAC Lead Generation and Sales

Do you know how to generate more HVAC System Renovation business? If you're currently selling performance improvements and system renovations, this class will help you understand how to improve your lead generation process and develop better pricing and selling techniques including a bundled approach to your solutions.

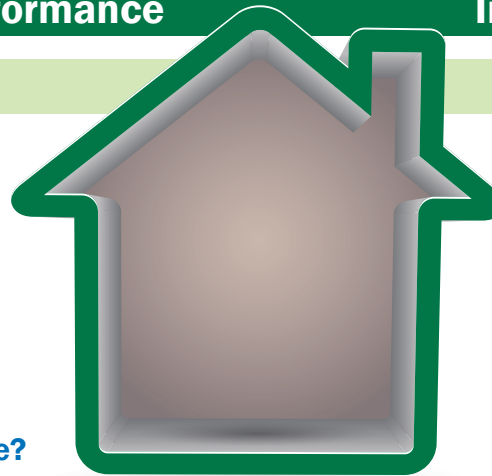
Fundamentals

So I'm Trained in Home Performance. Now What?

As a service company you are in the best position to introduce your customers to Home Performance services and evaluate their homes, then offering solutions. This session focuses on how to develop confidence in implementation of basic Home Performance testing, diagnostics, repair, and customer communication.

How Do I Begin to Make Money in Home Performance?

Knowing how to identify and solve home performance-related problems is step one. Step two is to help customers willingly invest in the solutions required to solve the hidden problems you've uncovered. Learn how to market initial Home Performance testing through HomeMaxx Check™ to help customers learn what can be done to make their homes safer, healthier, as well as more comfortable and energy efficient.



Advanced

Take Your Home Performance Training to the Next Level

Take the next step in NCI's unique HomeMaxx™ method by capitalizing on advanced testing including blower door, infrared, and pressure testing to hone in on the real issues and offer solutions that address both home and HVAC as a complete system.

Advanced Home Performance Lead Generation and Sales

Selling profitable Home Performance work requires a more structured process than the typical "wait until the customer complains" sales approach. In this next-step session, attendees will learn how to generate Home and HVAC Performance work year-round. The session will focus on a structured approach to build interest in your solutions, and a pricing approach based on "degree of difficulty" including bundling of integrated Home and HVAC solutions



Special Events & Summit Highlights

NCI 5th Annual Golf Outing - Sunday February 22

Be sure to join with your fellow performance-based contractors in a friendly round of golf in sunny San Diego!

Ask The Coaches Member & Coaches Roundtable - Sunday February 22

The industry-leading NCI coaches and participants will meet to discuss successes, challenges and hurdles they have overcome in their businesses through their ongoing coaching sessions. All conference participants are welcome. There will be an opportunity for audience questions at the end of the session.

Welcome Reception - Sunday February 22

Our good friends at Goodman are offering this fun, informal gathering Sunday night to kick off Summit! Right on the beach facing the Pacific Ocean, this will be a great time to meet up with old friends and make new ones.

Idea Meeting - Monday February 23

Join your fellow members on Tuesday afternoon in what has been a long-standing tradition at NCI Conferences: Our Idea Meeting. Here's how it works: Every participant puts \$20 in the pot and submits their best winning idea for a vote from the group. The winners share the pot based on their standing. Don't have an idea? For just \$20 you can listen to some of the best business ideas from some of the most successful contractors around the US and Canada.

Keynote Luncheon - Monday February 23

We've got a special keynote for you this year: Dr. Denis Waitley! Fresh off of his speaking engagements for corporations like Microsoft & Ford, he will be talking to our group. Be sure to register today so you don't miss out!

Preferred Partner Reception & Trade Show - Monday February 23

You'll have a chance to win valuable prizes and take advantage of many show specials while you enjoy refreshments and networking with fellow NCI members when you attend this reception and visit the booths of NCI preferred partners supporting Summit 2014!

Awards Banquet - Tuesday February 24

The awards banquet is a celebration of NCI members' passion for Performance-Based Contracting™ and their sustained success in the HVAC industry. As NCI President Rob Falke states, "These companies are the best of the best and we are proud to have them associated with National Comfort Institute."

Post-Conference Training

Wednesday, February 25

Advanced Carbon Monoxide Training

Qualifies for CO recertification hours.

Prevention is the key to avoiding Carbon Monoxide hazards in the home. Each year thousands of people in the United States become ill or die from CO poisoning. Without Full CO Safety & Combustion Diagnostics, there is no way of knowing whether a system is safe or efficient. Not only will you be saving lives by becoming CO Certified, but you will be opening the door to new sales opportunities and greater profit.

ComfortMaxx™ Software Training

Qualifies for A/B or SP recertification hours.

NCI introduces a revolution in field testing and system performance. ComfortMaxx™ 3.0 is an easy-to-use, web-based software tool that guides you through the performance testing process. Now you can spend less time doing math and filling out paperwork; and more time on building customer relationships and helping clients make the right energy and comfort decisions.

Wednesday & Thursday, February 25 - 26

Residential HVAC System Renovation & Retrofit

Qualifies for A/B and SP recertification hours.

Take the next step beyond HVAC system performance verification and diagnostics, and learn how to deliver accurate and profitable system renovations and retrofits that work. This is an advanced class and you MUST hold a valid NCI HVAC System Performance or Air Balancing Certification to attend.

Performance-Based Selling

Invest two days in learning a revolutionary sales process that will help you achieve the business results you've always dreamed of. Taking this class is the first step in creating a high performance sales team, with better closing rates and more delighted customers. The Performance-Based Selling course provides detailed training and tools based on NCI's simplified Performance-Based Selling process.



Summit 2015 Keynote: Dr. Denis Waitley

Denis Waitley has studied and counseled winners in every field from Apollo astronauts to Superbowl champions, from sales achievers to government leaders and youth groups.

During the 1980's, he served as Chairman of Psychology on the U. S. Olympic Committee's Sports Medicine Council, responsible for performance enhancement of all U. S. Olympic athletes.

With over 10 million audio programs sold in 14 languages, Denis Waitley is one of the most listened-to voices on personal and career success. He is the author of 16 non-fiction books, including several international best sellers, "Seeds of Greatness," "Being the Best," "The Winner's Edge," "The Joy of Working," and "Empires of the Mind." His audio album, "The Psychology of Winning" is the all-time best selling program on self-mastery.



"We are pleased and honored to have Dr. Waitley to help us kick off this year's Summit," says Dominick Guarino, NCI CEO. "Dr. Waitley is all about teaching people how to win, no matter the hurdles they face. His theme ties in nicely with this year's Summit, which focuses on creating a roadmap to implement Performance-Based Services in your business."

Dr. Waitley is a founding director of the National Council on Self-Esteem and the President's Council on Vocational Education, and recently received the "Youth Flame Award" from the National Council on Youth Leadership for his outstanding contribution to high school youth leadership.

As president of the International Society for Advanced Education, inspired by Dr. Jonas Salk, he counseled returning POWs from Vietnam and conducted simulation and stress management seminars for Apollo astronauts.

A graduate of the U. S. Naval Academy at Annapolis, and former Navy pilot, he holds a doctorate degree in human behavior.

You can find out more about our keynote at his website: www.waitley.com.

Summit Hotel

Hilton San Diego Mission Bay Resort & Spa

NCI members will gather at the beautiful Hilton San Diego Resort & Spa on Mission Bay for what is sure to be an amazing conference in an incredible setting. This is definitely a destination for your whole family, and with a rate of just \$169/night, including all resort fees, our group block will likely fill up fast. So be sure to make your reservations as soon as possible. You can reserve your room(s) by calling (877) 313-6645, mention the National Comfort Institute group.



Bring the family and get there early, or stay a few days later and make it a fun vacation!

SUMMIT 2015

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