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Better Presentations Help Boost Retrofits

LITITZ, Pa. — Haller Enterprises isn't your typical mechanical contracting firm, especially if you consider its location in the historic, rural community at the heart of Pennsylvania's Amish country.

Founded by Rick Haller in 1981, the firm has grown steadily and now includes more than 250 employees and an expansion into HVAC, plumbing, hydronics, and electrical contracting. The contractor is using high-tech methods to educate

residential customers on the benefits of today's higher-efficiency, high-end systems and accessories.

In short, the company is using technology to boost its residential retrofit sales and to increase consumer education through program interaction, system design, and really nifty presentations.

NURTURING RETROFITS

John Michel is vice president of the Retrofit and Service Division. "We've pre-

pared for and nurtured our growth with great care," he said. "It's been an amazing process to see and be a part of it.

"Frankly, we've all been surprised by the pace of growth here, but much of it stems from how things began when our senior managers, Rick Haller and Lindy Bair, chose to build the company's foundation on respect for the employee and attentiveness to customer needs," said Michel.

A facet to the growth of Haller's Retro-



McFarlane (center) discusses equipment pros and cons with customers in the company's actual showroom.



McFarlane (left) performs load calculations on the spot for customers, using the Opportunity Manager software package from Opportunity Interactive Inc.

fit and Service Division, growing at a brisk pace, is a software platform they invested in and implemented in 2005.

“We needed and found HVAC contracting management and sales presentation software,” said Michel. “We’re certain that it attributed successfully to the growth of our division, helping us to achieve a 46 percent revenue jump in the first year.”

The system, Opportunity Manager, “met our high expectations,” he noted. “We recouped our investment in the software within several months with successfully sold jobs that included a number of large residential jobs where high-efficiency equipment was installed.”

SUPPORTIVE SOFTWARE

The software package from Opportunity Interactive Inc. was designed to give structure to and streamline the sales process, from running the sales lead to tracking sales staff performance, said its developer. One feature even sets a contracting firm’s desired profitability into the pricing.

The program’s interface is designed to let customers have a hand in creating their own system, while educating them about

the benefits of higher-end equipment and accessories.

During the initial sales visit, the software leads a salesperson through a Manual J-based load calculation, adds HVAC equipment and capabilities based on the customer’s needs, calculates labor time and rates, and imports photos from the home that can be sent to the home office for review prior to quotation.

The software developer spent two days introducing the staff members to the software. “Several of us were trained in the use of the software, but the sales staff has become especially proficient with it,” said Michel. “When our salespeople go out on a call, their use of the software has become our points of differentiation.”

“Our sales presentations are so much more comprehensive,” said Edward McFarlane, sales manager, Haller Enterprises. “They include data on the building, several equipment options, a complete cost quote, and photos of old and new equipment. It maximizes our time in front of the customer.”

VIRTUAL SHOWROOM

Another module in the package illus-

trates how different products work. For example, using sounds and animations, it demonstrates how loud standard units are compared to variable-speed systems. “It’s not us just telling the customer what they get, but allowing them to see and hear it too,” said McFarlane.

“It’s like a virtual showroom. Being able to demonstrate these product benefits with animations and video has made it a lot easier for homeowners to choose higher efficiency and quieter equipment,” he continued. “We’ve also found it much easier to communicate effectively to homeowners the importance of having programmable thermostats, air cleaners, and other accessories that benefit them directly.

“Our closing ratios with all of these products have risen remarkably.”

The program’s “Instant Job Packet” includes the instruction sheet, pull sheet, load calculations, details and photos of the existing installation, and information for the installer on the homeowner’s comfort concerns.

“The proposals have added greatly to the professionalism of our work,” said McFarlane.

“We leave behind a color-printed pro-



A program from Opportunity Interactive allows Haller Enterprises sales manager Edward McFarlane (left) to enhance his sales presentation. “Being able to demonstrate these product benefits with animations and video has made it a lot easier for homeowners to choose higher efficiency and quieter equipment,” he said.

posal with pictures, equipment descriptions, inclusions and exclusions of work, options, discounts, and a bottom line price — not a handwritten bid on a piece of paper.”

“Our salespeople focus much of their attention on the explanation of system benefits, such as high-efficiency hybrid systems that couple a 14 SEER or better heat pump with a 90-plus-AFUE variable-speed furnace,” said Michel. “The equipment is well-matched to the area and our weather conditions. After all, they will see immediate and long-term benefit, given rising energy rates.

“But it all comes back to our ability to present it well, and to communicate clearly with customers, showing them all the op-

tions that they have in a way that’s not confusing or intimidating.”

PHYSICAL GROWTH

It certainly must be working. The contractor’s new headquarters facility was designed to meet the needs of the growing firm. Although the two-story structure is only six years old, the owners already added substantially to its size last year, making accommodation for the larger number of employees, with additional offices and a “Haller University” training facility.

There, employees learn the latest in safety and installation techniques, the latest changes in building codes, and can re-

ceive certification training.

“In March of 2006, we went through the intensive training here,” said Michel. “Since then, we’ve added three more salespeople. Our presentations are strapped down and consistent. And though the new construction market has slowed somewhat, we’re gaining market share. The recipe is working.”

Haller also has branch offices in Mechanicsburg (30 employees) and Palmyra (about 10 employees). The company’s three key divisions are Commercial Service and New Construction, Residential New Construction, and Residential Retrofit and Service. ■