



BUILDING WEALTH IN THE ROCKIES RESIDENTIAL HVAC OWNERS SUMMIT AGENDA

PRE-EVENT: MARCH 26, 2025

- 4:00 PM – 6:00 PM** Hotel Check-In
- 6:00 PM – 8:00 PM** Cocktail Reception (*Appetizers Provided*)

DAY 1: MARCH 27, 2025

- 7:15 AM – 8:00 AM** Breakfast
- 8:00 AM – 9:00 AM** Introduction to Mindset Fundamentals (*Presented by Weldon Long*)
- Learn the mindset principles that drive consistency and success in sales and business growth.
 - Explore how emotional resilience impacts decision-making and leadership.
 - Develop a prosperity-focused mindset to overcome challenges and seize opportunities.
- 9:00 AM – 10:00 AM** Financials – Departmentalization & Overhead Allocation (*Presented by Weldon Long*)
- Understand how to structure departmental financials to track performance and profitability.
 - Learn how to allocate overhead costs to improve financial clarity and decision-making.
 - Discover how proper financial tracking directly impacts private equity valuation.
- 10:00 AM – 10:20 AM** How to Scale or Sell with Software (*Presented by Breezy*)
- Identify the key tools and software HVAC businesses need to scale operations efficiently.
 - Understand how technology enhances tracking of KPIs and recurring revenue metrics.
 - Discover how software adoption aligns with private equity benchmarks.
- 10:20 AM – 10:35 AM** Break
- 10:35 AM – 12:00 PM** Leadership and Culture (*Presented by Steve Shallenberger*)
- Learn the 12 principles of highly successful leaders to transform organizational culture.
 - Discover how to build a leadership team that inspires trust, accountability, and growth.
 - Understand how culture impacts operational performance and business value.
- 12:00 PM – 1:00 PM** Lunch Provided
- 1:00 PM – 3:30 PM** Sales Fundamentals – Building an Unstoppable Sales Process (*Presented by Weldon Long*)
- Master the Sales Presentation Flip Book & Price Cards to drive consistency in closing.
 - Explore the “Sales Hallway” and Consistency Principle to build rapport and trust.
 - Define clear roles and expectations for Leads, Techs, and Sales Teams to optimize results.
- 3:30 PM – 4:00** Private Equity Business Evaluations (*Presented by APEX*)
- Learn how private equity evaluates HVAC businesses and identifies growth opportunities.
 - Understand the key metrics that drive valuation, including recurring revenue and scalability.
 - Receive actionable tips to position your business for a top-dollar exit.

- 6:00 PM – 8:00 PM** **VIP Experience with Weldon Long & Special Guests**
- Premium whiskey and cigar pairings in an intimate networking setting.
 - Music and a catered dinner featuring Colorado's finest cuisine.
 - Exclusive access to residential HVAC's elite leaders for insights and mentorship.
 - Additional \$799 (Member Price) / \$899 (Non-Member Price)

DAY 2: MARCH 28, 2025

- 7:15 AM – 8:00 AM** **Breakfast**
- 8:00 AM – 9:00 AM** **Peak Profit Performance in Trades** *(Presented by Gary Elekes)*
- Assign all revenue, labor costs, materials, and overhead to the correct department to identify areas for improvement.
 - Focus on gross profit per department, not just total revenue. This ensures you know which areas are driving real profitability.
 - Ensure your P&L statements match operational KPIs
- 9:00 AM – 9:15 AM** **Break**
- 9:15 AM – 10:00 AM** **Execute Consistently on Your Important Goals - Based on the Four Disciplines of Execution (Weldon Long)**
- Goals should be clear, measurable, and aligned with your overall objectives
 - Lead measures predict success and can be influenced directly
 - Create a simple, visible scoreboard that tracks lead measures and goal progress to keep the team motivated and accountable.
 - Take consistent accountability and commit to your next steps
- 10:00 AM – 10:15 AM** **Break**
- 10:15 AM – 12:00 PM** **Putting First Things First – Escape The Whirlwind** *(Presented by Weldon Long)*
- Discover how to focus on high-impact tasks and eliminate distractions in your business.
 - Learn how proactive planning reduces inefficiencies and improves business outcomes.
 - Learn how prioritization improves both profitability and personal well-being.
- 12:00 PM – 1:00 PM** **Lunch Provided**
- 1:00 PM – 2:15 PM** **Mindset and Building Prosperity – Plan and Quiet Time Ritual** *(Presented by Weldon Long)*
- Develop a daily ritual to focus on your most important business goals.
 - Learn how consistent planning leads to consistent results and long-term growth.
 - Create a personalized action plan to align your business with private equity metrics.

2:15 PM – 2:30 PM Break

2:30 PM – 3:00 PM **The HVAC Marketing Trap: Why Your Ads Aren't Bringing in Big-Ticket Jobs** *(Presented by Shane Champlin)*

- Google's Eating Your Profits – You're stuck paying for overpriced leads that only bring in low-margin repairs. Learn how to break free with Facebook ads that generate high-profit system replacements.
- Stop Waiting for Emergencies to Make Money – Right now, you only get calls when something breaks. I'll show you how to use Facebook ads to target homeowners before they even start searching.
- It doesn't have to be loss-leader or nothing – Repair calls are vital, but they're also a gamble. What if you could use Facebook ads to skip straight to selling system replacements? This session will show you how.
- Outsell Your Competitors Without Competing – Everyone fights over the same small pot of Google leads. I'll show you how to use Facebook ads to tap into a market they don't even see and dominate without price wars.
- Unlock a 7-Figure Revenue Stream Hiding in Plain Sight – There's a massive group of homeowners ready to buy—but no one's reaching them. Facebook ads put your offer in front of them before they think to Google it.

3:00 PM – 4:00 **Debrief and Close – Plans for Your Future** *(Presented by Weldon Long)*

- Review key takeaways from the event and build a roadmap for your business's next steps.
- Identify immediate actions to improve profitability and scalability.
- Gain clarity on long-term goals, whether selling or sustaining your business for growth.

4:00 PM Depart