



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*)
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DAY 1: MARCH 27, 2025

- 7:15 AM – 8:00 AM** Breakfast
- 8:00 AM – 9:30 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.
- 9:30 AM – 10:00 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.
- 10:00 AM – 10:15 AM** Break
- 10:15 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 – 9:15 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
- 9:15 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 <i>(Presented by Weldon Long)</i> <ul style="list-style-type: none">• 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 <i>(Presented by Shayne Champlin)</i> <ul style="list-style-type: none">• 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 <i>(Presented by Weldon Long)</i> <ul style="list-style-type: none">• 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