



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 Sale 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 – 12:35 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.
 - Live 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** **Benefits of Being Proactive vs. Reactive**
- Learn how proactive planning reduces inefficiencies and improves business outcomes.
 - Discover strategies to anticipate market changes and customer needs before they arise.
 - Develop frameworks to prioritize tasks that drive profitability and long-term value.
- 9:00 AM – 9:15 AM** **Break**
- 9:15 AM – 10:00 AM** **Seek First to Understand, Then Be Understood *(Presented by Weldon Long)***
- Master communication strategies that build trust with employees, customers, and stakeholders.
 - Learn how to ask better questions to uncover hidden opportunities in your business.
 - Understand how empathetic leadership leads to stronger relationships and better results.
- 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.
 - Build time management systems to free yourself from daily firefighting and chaos.
 - Learn how prioritization improves both profitability and personal well-being.
- 12:00 PM – 1:00 PM** **Lunch Provided**
- 1:00 PM – 3:00 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.
- 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**