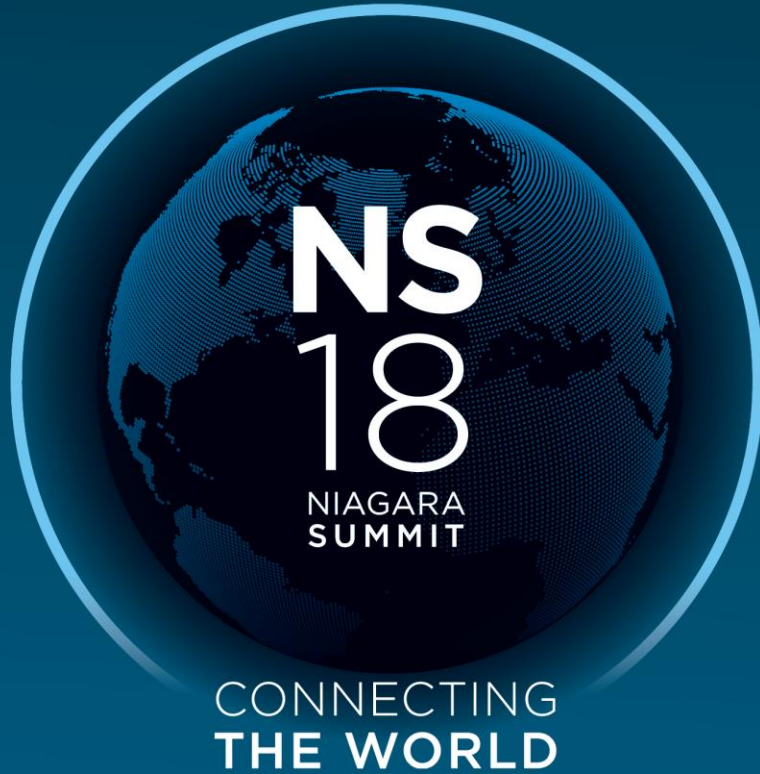




CONNECTING
THE WORLD



Future Proof your Business.

Aaron Gorka
Innovation Manager



Future Proof your Business.

1. Company Culture & How this Shapes Management.
2. Company Growth & Key Factors for Young Folks.
3. Company Technology & Tips to Do-it-Right.

All About Aaron

- **Honours BBA (Co-op)**
 - Entrepreneurship, Management, Marketing, Human Resources
- **25 years' Industry Exposure**
 - Shop Kid, HVAC & Electrical Helper, Business Development, Jr. Project Manager, Operations Manager, Innovation Manager
- **ControlTrends Field Reporter**
 - 2018 ControlTrends Young Gun Inductee
- **Leader of the “ANT Colony”**
 - HVAC & Control Contractors / Distributors
 - Canada, USA, United Kingdom, Uruguay

CONTROLTRENDS
control news you can use



All About ANT

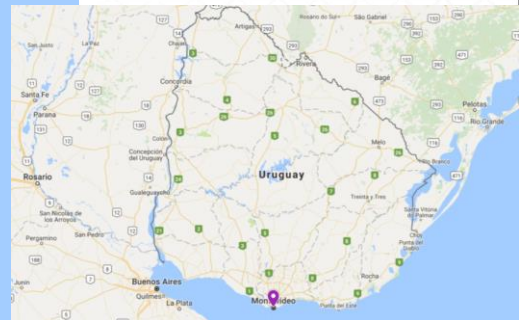


- Started as an R&D Division, became a Software Company, becoming a Community of Innovation. Began with Equipment Tracking ... 7-years-later ...
- Paperless, cloud-based, operational technology for HVAC & Control Contractors. Built from scratch with our Field Technicians as the primary focus.
- ANT “Colony” mentality guides all product development. As the Colony has ideas or finds improvements, we slot them into our Development Queue; *for free*.

Tracker Platform = Service, Project, and Tenant.



The “ANT Colony”



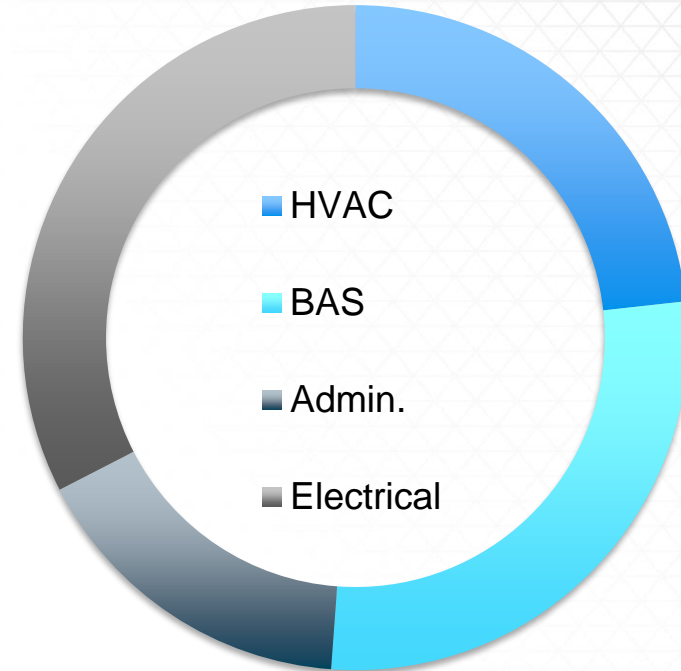
All About AIRON



- 10 HVAC Service
- 12 BAS Automation / Integration
- 7 Admin. / Overhead
- 14 Low-Voltage Electrical

~43 TOTAL EMPLOYEES

~\$7.7 M_{CAD} REVENUE



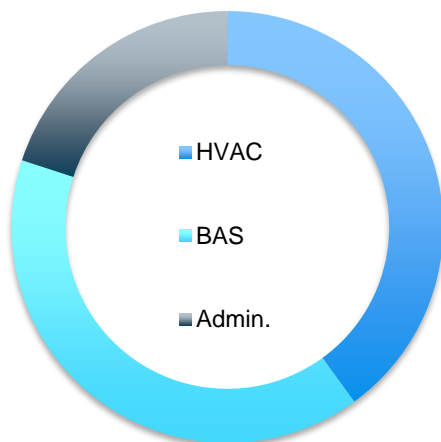
Setting – THE – Stage

TRINITY

- 2 HVAC Service
- 2 BAS Automation / Integration
- 1 Admin. / Overhead

~5 TOTAL EMPLOYEES

~\$450,000.00_{USD} Revenue

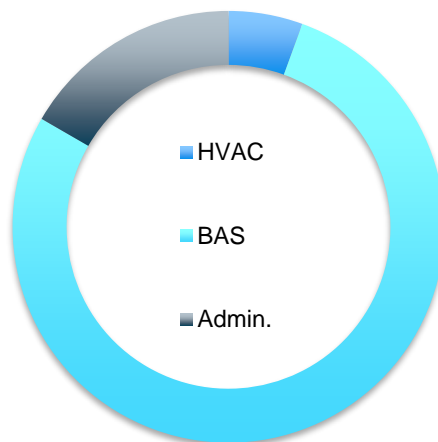


SYENERGY

- 2 HVAC Service
- 14 BAS Automation / Integration
- 3 Admin. / Overhead

~19 TOTAL EMPLOYEES

~\$5 M_{USD} Revenue

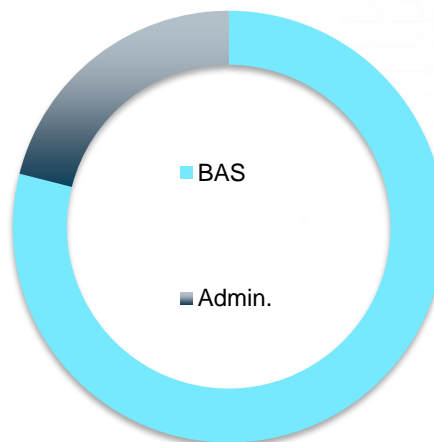


PALMER

- 15 BAS Automation / Integration
- 4 Admin. / Overhead

~19 TOTAL EMPLOYEES

~\$6 M_{USD} Revenue

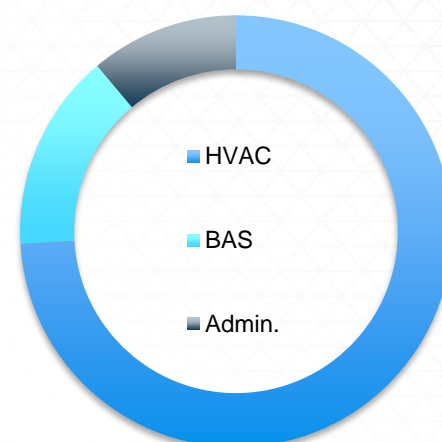


DE-CAL

- 20 HVAC Service
- 5 BAS Automation / Integration
- 3 Admin. / Overhead

~27 TOTAL EMPLOYEES

~\$10 M_{USD} Revenue



Company Culture



Machine-Bureaucracy

- Large Organization, lots of Red-Tape.
- Typically Publically Traded, Corporation.
- Long-Established, Nation Wide.
- Maximize Share-Holder Wealth.

Entrepreneurial / Owner-Operator

- Smaller, more nimble, creative, helpful.
- Privately-held, single Decision-maker.
- Likely first-generation business.
- Survive, thrive, make a 'Ding'.

Team-Centered

- Medium Organization, some Red-Tape.
- Privately-held, likely Partners involved.
- Regionally-established, brand-equity.
- Grow to capture Market-Share.

Company Culture

**NOW
HIRING**
APPLY TODAY

Machine-Bureaucracy

- Specialized Roles, Resumé centered.
- Rule-Followers and Formally Trained.
- Strong Internal Training.
- Wealth of Experience and Deep Pockets.

Entrepreneurial

- Multi-Tasking / Multi-Hat-Wearing Roles.
- Creative and Trade-Experienced.
- Figure-it-out, on-the-fly!
- Pull your weight, let's work together.

Team-Centered

- Hire to fill gaps, improve performance.
- Athletes and Military are great fits.
- Formally Trained in creating Standards.
- Let's become Great!

Company Growth



Company Growth

Differentiation

- “Negotiated” Work
- Apple, Starbucks, etc.
- Sell on “Value”, for higher Price
- Pleasant experience
- Profitable through Client Services
- Culture focused on Quality
- Relationship-focused

Low-Cost

- “Bid & Spec” Work
- Walmart, McDonalds, etc.
- Low Price, Wins the Sale
- Efficiency & effectiveness
- Profitable through Low Overhead
- Culture focused on Costs
- Transactional-focused



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Company Growth

Tangible Differentiation Tactics

- Eliminate Proprietary System “Hostage-Taking”.
- “Tale of Two-Trucks” – Scheduling HVAC/BAS PM together.
- Asset Tracking / Customer Portal to Services provided.
- Field Quotes and Service Reports before leaving Site.
- Critical Alarm Matrix / Tailored 24/7 Service.
- Pro-Active / Real-Time Energy Services.
- Performance Driven Success.

** Every Tactic listed requires a Platform-Solution.*



Company Technology



- Accounting
- Dispatch
- Field Function
- Platform



Company Technology



Providers of Technology

- Platform-Technology approach vs. Proprietary-Development approach.
- Specialized Development philosophy vs. Accounting Software add-on.
- Consider the Team you are adopting / partnering with, not the Product itself.
- Consider the outside Collaborators you get to work with.
- Training and Support is Vital ... Do they understand HVAC & Control?
- What is their End-Goal? Is their Team engulfed in our Industry?
- Features will always be Developed / Improved ... Do they care about your Team?

Company Technology



Millennials and BEYOND!

- NEED Technology Tools to Perform.
- Will leverage baseline Technology for efficiency.
- Typically WANT to improve Processes.
- Enjoy active learning, and require guidance.
- Are exceptional Collaborators.
- 'People', 'Technology', & 'Numbers' people.
- Thrive on Challenges with Coaching.



Wrapping-it-Up.



Culture

- Know your Culture-Type.
- Commit to being 'Yourself'.
- Learn it, Live it, Love it.
- Hire on Values, Train wisely.
- Never stand still.

Three-Step Interviews:

- Cultural-Call, Technical-Test,
Role Clarity & Salary Finalization.

Growth

- If you're not in-the-light, you wither.
- Move good people along, move them up, or move them out.
- Strategize based on Team Skills.
- Be crystal-clear and motivating.
- Always be evaluating and improving.
- Differentiation drives Sales and Growth.

Wrapping-it-Up.



Technology

- So many options ...
- Pick a Partner / Teammate.
- You need it to get the Young Guns.
- Be open to learning and Change.
- You are experienced in Change.
- Don't get hung-up on Features.
- This is your future retirement.

Key Messages

- Companies all-over-the-World have the same challenges as you.
- Platform Technology with a strong Community will support your success.
- Don't be scared of your Young Guns, they're better prepared than you think.
- Your Success is Built on Your Performance. Always have fun.



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