

Grandy & Associates



We Teach Contractors How to Run A Profitable Business

If you want to know what it takes to run a profitable contracting business then Grandy & Associates has the training, products and programs to help you meet your goals. We work with HVAC, plumbing, electrical, pool & spa, and many more service industries to teach you and your employees how to run the best business possible.

ABOUT OUR COMPANY

Grandy & Associates is a leader in business and systems training for the trades industries. Our purpose is to teach distributors and dealers profitable business strategies and systems knowledge. We have trained over 30,000 distributors and contractors across the United States and Canada through workshops, one-on-one coaching, industry-specific systems training, team assessments, online training and more. It is our desire to teach contractors in a way that they can positively impact their companies and the lives of every employee on their team.

Our company routinely presents at National and State trade conventions: ACCA, PHCC, QSC, MCA, NCSG, FSPA and Comfortech, to name a few. In addition, we write articles for numerous trade publications: Contracting Business, Electrical Contracting Products, HVAC Insider, Lawn and Landscape, the News, Reeves Journal, RSES Journal, Sweeping and Contracting Canada; along with various state PHCC magazines.

OUR VISION: Helping you achieve your goals and maximize your profit dollars is what Grandy & Associates is all about. We seek to provide a simple, easy process of growth and development for our Contractor and Distributor partners. Whether it is live classes, personalized coaching, or our On-Demand learning center; everything has been designed with you in mind. Everyone on our team is committed to providing a great customer experience each time we are privileged to serve you.

WHAT'S INSIDE

• OUR TRAINERS	• SUCCESSION PLANNING
• PLANNING FOR PROFIT™ WORKSHOP	• DEVELOPING A LEADERSHIP MINDSET
• 15 KEYS TO CONTRACTORS' SUCCESS	• MANAGER'S TACTICAL TOOLS WORKSHOP
• CUSTOMER DRIVEN SALES	• BLUEPRINT FOR SUCCESS
• POWER OF THROUGHPUT	• COMPANY OVERVIEW - ONE-ON-ONE COACHING
• SERVICE DEPARTMENT MANAGEMENT	
• HVAC SALES MASTERY®	

OUR TRAINERS



Bill Kinnard
President & CEO

Bill joined Grandy & Associates in 2005 and is the current President and owner of the company with over 30 years experience in the trades industry. He has conducted decades of business, financial, technical and customer service training.

Bill has a unique ability to connect with people as well as a passion for teaching contractors to better understand their businesses and to help their employees become superior performers.



Patrick Chapman
Trainer & Business Consultant

Patrick joined the Grandy team in 2017 in the role of trainer and consultant. He has over 25 years of experience in HVAC serving in various roles including Sales, Service, Installation, Job Inspections, Administration, and Territory Management. His expertise includes both commercial and residential system applications.

His teaching style creates an engaging learning environment where students discover proven success strategies. He also serves as a consultant for local contractors with a hands-on approach to help teams unlock greater profitability and discover the pathway to consistently achieve their goals.



Elise Radawitz
Trainer & Business Consultant

Elise Radawitz has been in the talent development space for over 15 years. She began her career in HR-roles where she created processes to successfully on-board and retain employees. From there she held sales enablement roles and worked with sales leaders to define the competencies and development plans for sales teams in addition to developing tools to improve their sales processes.

Most recently she led Learning & Development working internally with managers to create career paths for their employees. Elise now sets the strategy and execution as the President at Velocity Leader.

OUR TRAINERS (Continued)



Bill Rozga
Tech Trainer and Master Plumber 2024

Bill has over 43 years of experience in the plumbing industry. In 1981, Bill founded Rozga Plumbing Corporation serving SE Wisconsin homes and businesses with plumbing, sewer, and water. In 2018, Bill sold Rozga Plumbing Corporation to pursue his next passion... the training of future generations to realize the pride, profit, and personal satisfaction obtainable in the licensed trades.

Bill believes training in the trades should begin as early in life as possible and that ongoing education is required to keep abreast of ever-changing cultural shifts, technology, and advances in tool development. In 2020, Bill joined the team of Grandy and Associates out of Green Bay, WI. Grandy and Associates is a teaching/training organization helping individuals and contractors become better trained, equipped, and profitable in their chosen trade professions.



Jordan LeClaire
Trainer & Business Consultant

With over a decade of experience in both the education and corporate training industry, Jordan is passionate about equipping professionals with the tools and knowledge to thrive in today's competitive market. His focus on business culture and organizational transformation helps businesses create lasting change by fostering positive, adaptable work environments. His approach emphasizes practical strategies for developing strong internal cultures, improving

communication, and driving innovation at all levels of an organization.



Ric O'Sullivan
Trainer & Business Consultant

Ric O'Sullivan joined Grandy & Associates in August 2025, bringing with him decades of hands-on HVAC experience. Raised in the industry through his father's company in Southern California, Ric worked his way up from a young age and went on to manage and grow several successful HVAC businesses, including founding his own company, Falcon Air Conditioning. After relocating to Idaho and later Washington, Ric spent over 20 years in distribution roles with Trane and

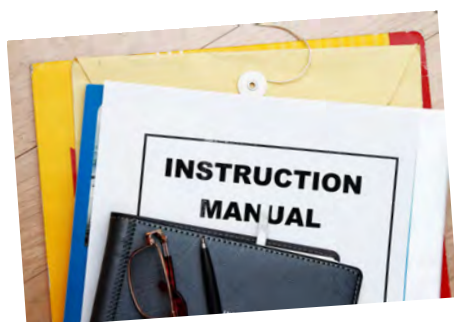
Airefco (now Ferguson), earning multiple top national performance awards. Following a corporate downsizing at Ferguson in 2025, Ric embraced the opportunity to give back to the industry that shaped his life and career by joining Grandy & Associates.

PLANNING FOR PROFIT™ WORKSHOP

Learn your numbers, grow your profits, get guaranteed results.

That's what the Planning For Profit™ Workshop is all about. Over the last three decades, thousands of contractors have experienced the transformation this workshop can provide.

In this two-day workshop, you will build an active working model of your company using the Planning For Profit™ Software tool. You will learn how to accurately figure job cost, hit your profit targets, and discover the exact rate you should charge per department of the company. Use the company dashboard feature to easily track profitability at a glance and easily make changes.



EACH COMPANY RECEIVES:

- Two days of interactive training
- Follow up coaching after the workshop to help you apply what you learned.
- Planning For Profit™ Software
- Student manuals
- Team Communication Assessments
- Four follow up Alumni webinars included
- Planning For Profit™ community access

TOPICS:

- Determine the rate you need to charge per department to hit your profit goals.
- How to adjust your pricing over the growth cycles of the company.
- Set proper maintenance agreement pricing.
- Use the job calculator so you never again wonder if you priced a job correctly.
- How to cover costs today and plan for tomorrow.
- Preview the impact of adding employees, changing overhead, adjusting mark-up, all before you make the decision.
- And much more...

We are so confident you will love this workshop, Grandy & Associates offers a 100% satisfaction guarantee. If you attend and do not see the value by the end of day two, you will be given a full refund. Bring your team members to the training at no additional charge. Each company may bring up to **THREE** team members to the workshop. Invest in your future by registering for the Planning for Profit™ Workshop today.

Who should attend?

Business Owners
Bookkeepers
Service Managers
Key Leadership Members

Scan the QR Code for more information to request this training.

Qualifies for
16 NATE Credits



15 KEYS TO CONTRACTORS' SUCCESS

There is a reason top performing companies are successful. You would already be enjoying the profits you want for your company and experiencing the life you want for your family if just hearing good information was enough. This training is designed to give you insight into specific steps you can take to see immediate impact!

We will cover:

- Labor Pricing - Calculating profitable rates
- Cash Flow - Projecting cash flow needs
- Business Plans - Develop a plan for the future
- Marketing Plan - Using tools that work
- Interactive Buying Experience - Today's customers expect it
- Social Proof - Leveraging what others say about your company
- And much more!

During this class, we will review 15 keys successful companies have in common. You will score your company in each of these 15 key areas to see how you are doing now. Then, we will lead you through tips and tools that are customizable to your company to unlock the next level of success for your team. Join us for this interactive learning experience.

Who should attend?

Business Owners | Key Managers

Scan the QR Code for more information to request this training.



CUSTOMER DRIVEN SALES CLOSING MORE AT THE KITCHEN TABLE

To close more deals at the kitchen table, you first must get to the kitchen table. The Customer Driven Sales class will guide you step by step from first contact to closing the deal! The goal of this class is to help you close more deals at a higher average ticket on a consistent basis.

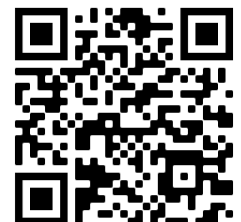


Topics Include:

- What are the five things your website must show to capture customer attention.
- CSR training to answer the 4 most important questions clients ask when setting the appointment.
- Comfort survey questions designed to uncover problems most important to the customer.
- Onsite assessment steps to remember so you don't miss revenue opportunities.
- Science of presenting solutions: The way you present solutions shape customer preferences.
- Ask for the sale: Moving from professional visitor to professional closer.
- Overcome objections: Proven responses to answer common objections and extend the conversation.
- Follow up: Only 1 in 8 sales professionals have a consistent follow-up plan.
- Secure customer reviews so you become a referral-based company.

Who should attend?

This one-day class is perfect for comfort consultants and selling technicians who are ready to take their skills to the next level and be more effective than ever.



Qualifies for 8 NATE Credits

POWER OF THROUGHPUT

Do you wish you and your team could be more productive every day? Are you using only Gross Profit and Net Profit to measure your company's efficiency? The Power of Throughput was created to address these issues. You will learn to easily define metrics that you can use to identify bottlenecks in production, improve your company's profitability and make more money! Learn how to define understanding HVAC KPI's (Key Performance Indicators) as sales dollars per employee per year.



Learn:

- How to define Throughput as sales dollars per employee.
- How to list the key measures of Throughput.
- How to give standard values for each ratio per individual counties.
- How to use micro-tagreted data to establish market profitability based on the specific counties you serve.

You can select from over 70 simple and low-cost/no cost strategies to improve Throughput and learn how to implement them into your company.



Who should attend?

Business Owners
Service Managers

Scan the QR Code for more information to request this training.

SERVICE DEPARTMENT MANAGEMENT

Your Service Department should be the most profitable department in your company. Service Department Management will help you set goals, track KPI's, create bonus systems and achieve greater profits.



Topics include:

- Identify common profit killers in your Service Department.
- Discover how to measure your techs performance against 10 critical KPI's.
- Learn how to conduct a productive and profitable weekly service meeting.
- Define "Qualified Sales Leads" and how they ignite retrofit sales.
- Calculate the number of Maintenance Agreements you need and how this brings enormous value to your company.
- Discover how to motivate your techs toward consistent peak performance.



Who should attend?

Business Owners
Service Managers

Scan the QR Code for more information to request this training.

**Qualifies for
8 NATE Credits**

HVAC SALES MASTERY®

This highly interactive and in-depth three day workshop will develop and foster the growth of successful sales techniques. It uses a complete, detailed and interactive approach to ALL aspects of the HVAC in-home sales call.

Sales Mastery Provides:

- 3 days of interactive sales training.
- Step by step playbook to win more deals.
- Master the art of the close showing value.
- Recorded sales presentation to take home.
- **3 individual coaching sessions after class.**

HVAC
Sales Mastery

3-DAY
WORKSHOP

Discover the process of turning conversations into contracts.



You will leave with the Sales Mastery Playbook to help you maximize your investment and apply what you learn.



Patrick Chapman
Presenter

You will learn:

- Sales process from the first hello to the close.
- How to close when you are higher than other bids.
- How to identify the real objection.
- Leverage your product distinctions.
- Leverage your company distinctions.
- Strategies to lead with the best option.
- How to use the comfort survey to uncover every problem you have a solution for
- How to ask for the sale and overcome objections.
- Follow up beyond "checking in."
- Sales Communication using DISC

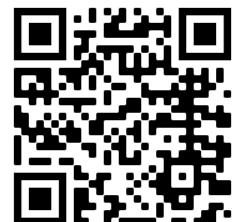
Previous student review:

Best class on any topic I have attended!

The class was structured perfectly to keep my attention. I have much more confidence now that I have a process to follow on every sales call. I plan on attending again and definitely will recommend to anyone. Travis C.

Who should attend?
Comfort Consultants
Selling Technicians

Qualifies for
20 NATE Credits



CONTRACTOR SUCCESSION PLANNING

Succession Planning is a vital step in ensuring the future success of your company. However, given the impact on the owners and the organization; it is also one of the most difficult processes to undertake. One question every business owner eventually asks... **WHAT NEXT? *This is where we can help!***

Through our training, tools and resources, we will guide you through making the best succession planning decisions for you and your business.

We will walk you through every step of building and executing the best succession plan for you, your team and your business.



You will learn:

- The critical importance of succession planning.
- Learn how to evaluate the current health of your business.
- Get your team onboard with the process.
- Select the right leader for the future.
- Learn how to delegate and empower your team.
- And so much more

You will:

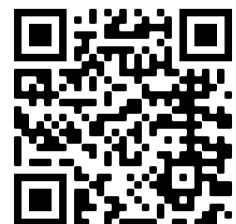
- Get your first look at what it takes to develop, plan and implement a successful succession plan.
- Take a deep dive into evaluating successors, setting benchmarks, identifying gaps, creating position profiles and clarifying organizational needs.
- Begin preparing and professionally developing current leaders. Evaluate performance based on proven metrics and assessments.
- Evaluate and adjust your business financial model to accommodate both your needs, as well as the current and future needs of the company.
- A comprehensive and formal business audit allows you to create a compensation agreement and maintain valuable relationships.

Do NOT wait until you are ready to retire to attend a class like this one. Most of the action items discussed should be implemented many years in advance of any succession date.

Who should attend?

Business Owners

Scan the QR Code for more information to request this training.



Developing A Leadership Mindset

Develop Self-Awareness to Lead Yourself Better!

Program Objectives:

- Enhance self-awareness
- Improve communication and conflict resolution skills
- Gain insights when your thinking is serving us well and how that impacts relationships
- Strategies to develop a psychologically safe workplace that fosters candor and collaboration

You will learn:

- Understand the science behind the connection between our thoughts and actions
- Tools to intentionally become better versions of ourselves through self-reflection and practice
- Techniques to become an active listener and provide feedback in a meaningful way
- Strategies to leverage conflict to strength relationships

"Great management training!"

"Elise's class was amazing. A real eye opener. "

"I enjoyed this class very much!"

Leadership is a behavior, not a title or role. Every employee at every level has an opportunity to show up as a leader.

Attend this workshop to enhance YOUR leadership mindset.

This program for the rising stars in your company who are on a leadership track, managers newly promoted into a leadership roles, or any leader who wants to improve their leadership skills



Elise Radawitz



Manager's Tactical Tools Workshop

Equip Your Managers to LEAD

Participants will learn:

- The difference between leading and managing, and the key skills to excel in both.
- Techniques to enhance self-awareness and strategies to elevate your team's morale.
- Conflict resolution strategies that build trust and foster collaboration.
- A proven method to deliver feedback that is meaningful and drives performance.
- How to identify future leaders and strategies for building a high-performance team.

This highly interactive and engaging workshop focuses on giving current managers and supervisors the practical tools and techniques to lead themselves and their teams more efficiently and effectively.

What They'll Gain:

- Better self-understanding and communication
- Tools to build trust and manage issues
- Skills to boost team spirit and productivity

“The training made me think about how to manage my HVAC business.”

“Great class, new ideas and instructor was personable and funny.”

“Elise's class was amazing. A real eye opener.”



Elise Radawitz



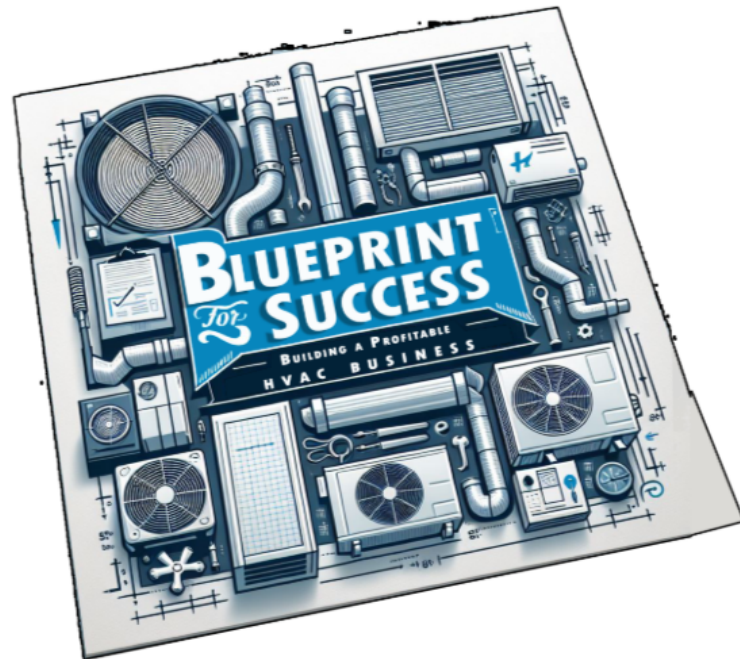
Blueprint for Success

Topics include:

- Develop a clear company mission, define core values, and establish healthy culture.
- Message & Marketing: Social presence, websites that work, lead generation and conversion.
- Profitable Products: Product development and product diversification to maximize profitability.
- Sales Process: From first contact to closing the deal, a clear process is key for consistent results.
- Team Alignment: Hire around company vision with clear job descriptions and performance reviews so employees see the path to promotion.
- Price & Cashflow: Learn what to charge and give every dollar an assignment.
- Communication Skills: This is people skills training. This section shows you how to talk to anybody better.
- Succession Planning: Keys to maximize company valuation for sell or transfer to the next generation.

Building a successful company can feel like a mystery. Most companies find themselves doing well in some areas, while struggling in others.

This class is designed to guide participants through 8 areas of company management you have to master to be profitable and sustainable.



Patrick Chapman
Presenter



Qualifies for 8 NATE Hours!

COMPANY OVERVIEW

ONE-ON-ONE COACHING TO MAXIMIZE YOUR PROFITABILITY

ONE-ON-ONE COMPANY OVERVIEW takes our popular Planning For Profit™ two-day workshop several steps further. At the heart of the Company Overview is one-on-one, individualized coaching onsite at your location. You will get two days of focused attention from our coach to learn exactly what you have to do to cover costs for your specific company, while generating the profits you want.

Schedule your One-on-One Company Overview today!

Areas of Focus:

- Custom printed materials
- Workbooks and manuals, assessments, policy manuals
- Planning For Profit™ Software and training
- Tax tips and information
- On-site, one-on-one training at your location
- Involves the entire team in the planning / modeling process
- Private with full attention of the consultant for two days
- Create a customized financial business plan with follow-up action steps
- “Why Do We Need to Charge So Much?” team training



Scan the QR Code for more information to request this training.

CONTACT Us



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Visit our website to learn more about all of our programs and services. You can register for workshops, training, and online courses, read our blog and subscribe to our **FREE** monthly e-Newsletter with profit-building articles and resources. You can connect with us on Facebook and LinkedIn as well.