

# 2025

# ANNUAL TRAINING CALENDAR

Catalog of Virtual &  
In-Person Programs

Last Updated December 31, 2024



SP-HVAC.COM

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*Click program name to jump to description.*

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## 2024–2025 Training Calendar (Chronological Order)

**SPGroup Platinum Members** enjoy exclusive territorial rights and access to all-inclusive training with no additional registration fees. **Non-members** may participate in SPGroup training by paying the per-person registration fee listed below, provided their service area does not overlap with a Platinum Member’s exclusive territory.

Program Name	Start	End	Location	Non-Member Fee
CRM Workshop: Kick-off & CRM Selection Guidance	2024-11-13		Virtual	\$2,400 for Series
Foundations of Project Sales	2024-12-03	2024-12-06	Fairfax, VA	\$4,750
Technician Service Summit	2024-12-09	2024-12-11	Charlotte, NC	\$1,175
CRM Workshop Session 1: CRM Setup – Users, Permissions & Roles	2025-01-21		Virtual	\$2,400 for Series
CRM Workshop Session 2: Lead Management & Setting Up Key Fields	2025-01-27		Virtual	\$2,400 for Series
Foundations of Maintenance Sales - Winter	2025-01-27	2025-01-31	Fairfax, VA	\$9,475
CRM Workshop Session 3: Activity Tracking & Workflow Automation	2025-02-04		Virtual	\$2,400 for Series
Leadership Book Club: 5 Dysfunctions of a Team Part 1	2025-02-13		Virtual	\$600 for Series
CRM Workshop Session 4: Setting Up Email Campaigns	2025-02-18		Virtual	\$2,400 for Series
The Communications Series Week 1: The Foundation of Effective Communication	2025-02-19		Virtual	\$600 for Series
CRM Workshop Session 5: Reporting & Measuring Results	2025-02-25		Virtual	\$2,400 for Series
The Communications Series Week 2: Understanding Communication Styles and Personalities	2025-02-26		Virtual	\$600 for Series
Leadership Book Club: 5 Dysfunctions of a Team Part 2	2025-02-28		Virtual	\$600 for Series

## 2024-2025 Calendar (Chronological Order) - Continued

Program Name	Start	End	Location	Non-Member Fee
Service Manager's Leadership Development Program	2025-03-03	2025-03-07	TBD	\$6,575
The Communications Series Week 3: Mastering Active Listening	2025-03-12		Virtual	\$600 for Series
Leadership Book Club: 5 Dysfunctions of a Team Part 3	2025-03-14		Virtual	\$600 for Series
The Communications Series Week 4: Overcoming Written Communication Challenges	2025-03-19		Virtual	\$600 for Series
The Communications Series Week 5: Conflict Resolution Through Communication	2025-03-26		Virtual	\$600 for Series
Leadership Book Club: 5 Dysfunctions of a Team Part 4	2025-03-28		Virtual	\$600 for Series
<b>2025 Principal's Meeting</b>	<b>2025-04-02</b>	<b>2025-04-04</b>	<b>San Jose del Cabo</b>	<b>N/A</b>
The Communications Series Week 6: Building Your Personal Communication Action Plan	2025-04-09		Virtual	\$600 for Series
Sales Manager's Guide to Maintenance Sales - The Workshop	2025-06-03	2025-06-06	Leesburg, VA	\$2,750
Advanced Maintenance Sales	2025-07-15	2025-07-17	Nashville, TN	\$1,275
<b>2025 LEADSeminar</b>	<b>2025-10-14</b>	<b>2025-10-17</b>	<b>San Antonio, TX</b>	<b>\$1,750</b>
Service Coordinators Workshop Week 1: Role Clarity & Bridging the Gaps	2025-10-24		Virtual	\$1,175 for Series
Service Coordinators Workshop Week 2: Effective Communication Skills	2025-10-30		Virtual	\$1,175 for Series
Service Coordinators Workshop Week 3: Prioritization & Time Management	2025-11-07		Virtual	\$1,175 for Series
Service Coordinators Workshop Week 4: Conflict Resolution	2025-11-14		Virtual	\$1,175 for Series

## 2024–2025 Calendar (Chronological Order) – Continued

Program Name	Start	End	Location	Non-Member Fee
Service Coordinators Workshop Week 5: Customer Relations & Managing Expectations	2025-11-21		Virtual	\$1,175 for Series
Foundations of Project Sales	2025-12-03	2025-12-05	Denver, CO	\$4,750
Service Coordinators Workshop Week 6: Problem-Solving & Critical Thinking	2025-12-05		Virtual	\$1,175 for Series
Foundations of Maintenance Sales - Spring	TBD	TBD	Fairfax, VA	\$9,475
Foundations of Maintenance Sales - Summer	TBD	TBD	Fairfax, VA	\$9,475

### Additional Sessions

Prospecting Club	Weekly <sup>1</sup>	\$1,600/year for Members & Non-Members
Closer's Club	Weekly <sup>1</sup>	Included in Platinum Membership; \$1,600/year for Non-Members
Principal Small Group Meetings	Two Unique Sessions per Month, Platinum Members Only	
Foundations of Maintenance Sales Virtual Sessions	Seven Virtual Sessions Prior to Each Boot Camp	
Leadership Book Clubs	Each quarter we will host a new book for the Leadership Book Club. Dates will be published the quarter prior.	

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<sup>1</sup> Beginning in December 2024

## In-Person Programs

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### Foundations of Project Sales

December 3-6, 2024 | Fairfax, Virginia

**Overview:** This 2.5-day Foundations of Project Sales class is designed for industry professionals, whether you're new to project sales or a seasoned expert seeking a refresher on effective strategies and best practices.

**Why This Class Matters:** Many project sales representatives come from a strong technical background but lack sales experience. Future success in sales hinges on your ability to build robust relationships with existing customers while providing tailored technical solutions. A common challenge is identifying and prioritizing the myriad of sales opportunities available.

**Course Content:** Participants will learn to navigate the complexities of relationship management and time efficiency through a disciplined sales process. This process encompasses:

- Opportunity assessment
- Telephone confirmation
- Building surveys
- Financial analysis
- Verification calls
- Proposal development
- Project start-up meetings

By mastering this sales process, attendees will effectively uncover customer needs, motivations, and project timelines, all while establishing a consultative business relationship. Key sales skills covered include:

- Qualifying prospects
- Probing and questioning techniques
- Active listening
- Objection handling
- Gaining consensus
- Selling to non-technical stakeholders

**Tools for Success:** Participants will also be introduced to essential sales tools, including project timelines, prospect profiles, and cash flow analyses, all aimed at improving customer communication and enhancing personal credibility.

**Hands-On Learning:** Utilizing a project case study, attendees will engage in practical exercises, allowing them to apply the tools and role-play crucial sales conversations.

**What You Will Learn:**

- Distinguish between capital budget requests and immediate project opportunities.
- Ask open-ended, probing questions to clarify customer needs.
- Employ active listening to foster consultative relationships.
- Transform reactive sales opportunities into proactive account plans.
- Present cash flow analyses effectively.
- Differentiate yourself from the competition.

**Your Key Benefits:**

- Master a consultative sales process.
- Build long-term business relationships.
- Increase your sales close rate.

*Facilitated by Brad Jovaag and Nicole Bass.*

## Technician Service Summit

*December 9-11, 2025 | Charlotte, NC*

*Maximum Attendance: 30 Technicians, Room Rate \$136*

We're excited to host our first-ever Technician Service Summit! This unique event is designed to bring together our lead technician community for a mix of impactful learning and networking.

### Agenda:

- December 9th: Arrival and check-in.
- December 10th: Lisa Austin will lead a 'core skills' training session, focusing on vital skills that have left a lasting impression on technicians for years. Your technicians will learn about:
  - Active listening
  - Understanding different personality types
  - The customer experience
  - Effective communication
  - Creating a positive internal environment
  - Taking responsibility
- The day will end with a group dinner, encouraging networking and relaxation after a full day of learning.
- December 11th (Half Day): A visit to the Carrier Chiller Manufacturing Plant. This includes a one-hour presentation from the Carrier team and a one-hour guided tour of their manufacturing processes. Lunch will be provided.

Due to capacity limits at the Carrier plant, attendance is limited to 30 technicians. This summit offers a fantastic opportunity for technicians to enhance their skills and build valuable connections. We hope you're as excited about it as we are and look forward to seeing your technicians there!



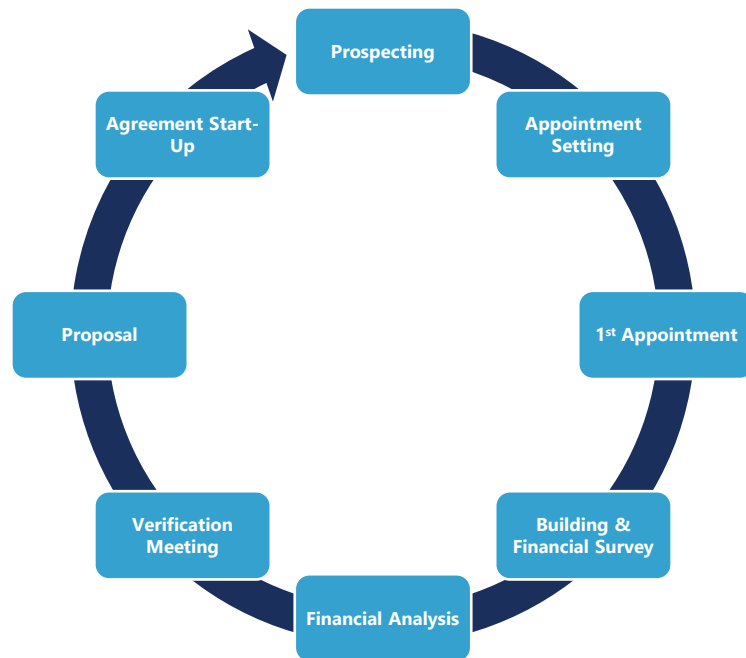
## Foundations of Maintenance Sales

*Virtual Kick-Off December 13<sup>th</sup>; Boot Camp January 27-31 | Fairfax, VA*

This 8-week program is designed to be the cornerstone of success for maintenance sales representatives at any stage of their careers. Formerly known as the "Initial Maintenance Sales Program," we've revamped the name to reflect its value as a foundation for both new and seasoned reps—many of whom, including top performers, return multiple times to sharpen their skills.

The **Foundations of Maintenance Sales** program covers every stage of the sales cycle, including:

- Prospecting
- Appointment setting
- Qualifier meetings
- Equipment surveys
- Financial surveys
- Verification meetings
- Proposal creation & presentation



### Program Structure:

- **Pre-Work (2-3 weeks):** Can be completed prior to or during the first 7 weeks at your home office.
- **First 7 weeks:** 2-4 hours of online learning per week, followed by a 2-hour virtual instructor-led meeting. These weekly meetings are designed to reinforce the concepts and provide practical exercises to apply them in real-world scenarios.
- **Final Week (In-person):** The finale of the program takes place over 5 days in Fairfax, Virginia. This is where everything comes together, and participants will engage in hands-on practice with real-world scenarios, preparing them to excel in the field.

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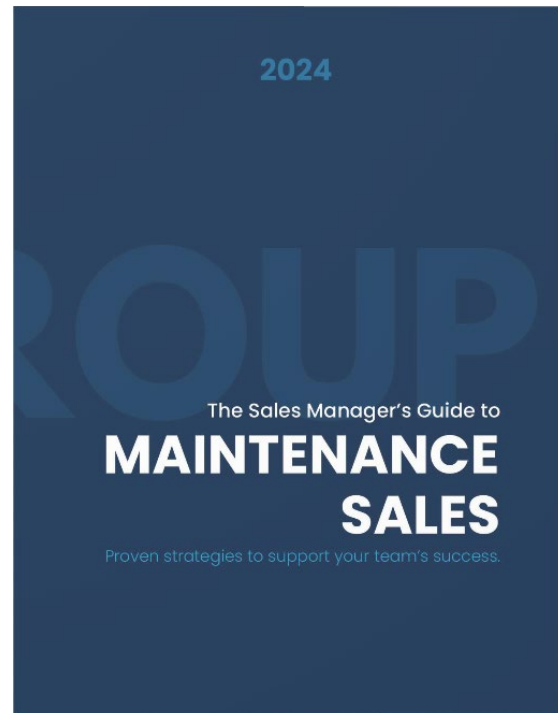
## **Sales Manager's Guide to Maintenance Sales**

Included as a part of this program is a printed copy of the **Sales Manager's Guide to Maintenance Sales** which provides information and resources to support your Maintenance Sales Representatives following their training with SPGroup.

Sales Managers are invited to audit the in-person boot camp for an audit fee of \$750.

The program follows the SPGroup sales process, built on a financial selling model rooted in ASHRAE's cost of owning and operating HVAC systems. This comprehensive approach ensures reps are equipped to add value to their customers and close more deals.

Offered three times per year, **Foundations of Maintenance Sales** is one of our most sought-after programs and plays a key role in driving SPGroup's growth strategies. Whether you're just getting started or looking to refine your skills, this program offers the tools, strategies, and hands-on practice to succeed in the competitive world of maintenance sales.



## Service Manager's Leadership Development Program

February – March 2025 | New Orleans, LA


Building on the success of our 2022 session, the **Service Manager's Leadership Development Program** has been revamped to provide a more consolidated learning experience. This 6-week program blends online learning with an in-person workshop to develop the skills essential for service managers to lead effectively in today's dynamic business environment.

### Program Overview

- **Weeks 1–5:** The first five weeks of the program are delivered online, allowing participants to progress through key modules at their own pace. Each week will focus on a specific core competency, helping service managers build a solid foundation in leadership, financial management, recruitment, communication, and HVAC service fundamentals. The online learning modules will cover:
  - **HVAC Service Fundamentals:** Introduction to the HVAC service industry and understanding client expectations.
  - **Leadership Fundamentals:** From identifying your leadership style to setting team goals and driving results.
  - **Financial Fundamentals:** Understanding financial reporting, gross profit management, and labor cost control.
  - **Recruitment:** Sourcing, tools, and maintaining a backlog of qualified candidates for recruitment success.
  - **Communications:** Both written, verbal, and non-verbal communication techniques, leading to more effective meetings and presentations.
- **Week 6:** The program culminates in an in-person, week-long workshop designed to reinforce and apply the knowledge gained during the online phase. Participants will engage in hands-on activities, simulations, and collaborative discussions, honing skills such as situational leadership, labor cost management, and motivating teams to achieve key outcomes.

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## Online Module Overview

Course Name	Module No. 1 	Module No. 2 	Module No. 3 	Module No. 4 
<b>HVAC Service Fundamentals 01</b>	Introduction to the HVAC Service Industry	Understanding the Client Expectations	Position Description & Performance Objectives	"A Day in the Life"
<b>Leadership Fundamentals 02</b>	Understanding Your Leadership Style	Establishing Team Goals & Objectives	Situational Leadership	Motivating & Inspiring to Achieve Outcomes
<b>Financial Fundamentals 03</b>	Introduction Financial Reporting	Managing Gross Profit Expectations & Objectives	Proactive Labor Load (Cost) Management	Understanding Burden (Allocation)
<b>Recruitment 04</b>	Recruiting Sources	Recruiting, Tools, Materials & Processes	The First Ninety (90) Days - Onboarding	Maintaining a Backlog of Qualified Candidates
<b>Communications 05</b>	Written & Verbal Communications	Non-Verbal Communications	Conducting Effective Meetings	Presentation Skills

## Key Learning Objectives

- Develop a deeper understanding of service management and client expectations within the HVAC industry.
- Learn to lead teams effectively by setting clear objectives and practicing situational leadership.
- Gain the financial acumen required to manage profit expectations, labor costs, and financial reporting.
- Strengthen recruitment strategies by utilizing effective sourcing tools and processes to build and maintain a qualified candidate pool.
- Improve communication skills to foster better team collaboration and present with impact.

## Commitment to Growth

We emphasize the importance of ongoing education, in line with our belief that "Training is Never Complete." Participants are encouraged to commit to a minimum of 20 hours of continuing education each year, keeping them on the leading edge of service management.

## The Sales Manager's Guide to Maintenance Sales – The Workshop

June 2025 | Lansdowne Resort, Leesburg Virginia ([www.LansdowneResort.com](http://www.LansdowneResort.com))

In 2024, SPGroup produced the **Sales Manager's Guide to Maintenance Sales**, a comprehensive 90-page resource designed to support Sales Managers in navigating the complexities of selling commercial HVAC maintenance agreements. This guide serves as a vital reference tool, offering reminders and steadying insights on key sales strategies rather than acting as an initial educational tool.

To truly master these concepts, however, Sales Managers must first experience the **training** and understand how the strategies apply in real-world situations. **Sales Manager's Guide to Maintenance Sales – The Workshop** is a two-day, in-person event that dives deep into the practical application of these principles, showing managers how to lead their teams, close more deals, and build sustainable growth. The workshop ensures that participants walk away with a clear understanding of the content in the guide and the ability to leverage it effectively as a resource in their daily leadership.

### Key Takeaways:

- Gain in-depth knowledge of the **SPGroup Sales Framework**, focusing on long-term maintenance agreements and full-service programs.
- Master the use of the **Cost of Owning and Operating HVAC Systems** financial model, and learn how to coach your team in presenting it effectively to clients.
- Understand how to analyze sales performance metrics using the **Sales Funnel**, and diagnose performance issues in your team.
- Develop effective strategies for **prospecting, appointment setting, and deal closing** to ensure consistent pipeline growth.
- Learn **team selling techniques**, territory management, and the art of balancing individual and team targets.
- Build and implement tailored **coaching plans** that address individual rep challenges while maintaining team alignment.
- Create a 90-day actionable plan for **coaching your team to success**, driving new business, and expanding the maintenance contract base.



## Advanced Maintenance Sales

*July 2025 | Nashville, TN*

For experienced Maintenance Sales Representatives (MSRs) seeking to take their expertise to the next level, this advanced session will equip you with the tools to navigate complex scenarios and provide **strategic, bundled solutions**. Building upon the core principles of maintenance sales, you will explore deeper strategies and apply key concepts from a Best Seller sales strategy, ***The Trusted Advisor*** by Maister, Green and Galford.

This session isn't just a class; it's a commitment to continuous learning and growth. Drawing from the ethos of the Navy SEALs—"My Training is Never Complete"—we emphasize that mastery is an ongoing journey. Your role as an MSR requires you to stay ahead of the curve, and we encourage a minimum of 20 hours of continuing education annually. Whether it's through SPGroup in-person events, our online *Foundations of Maintenance Sales* sessions, or watching SPGroup's recorded webinars, staying engaged in your learning is crucial.

Nothing can replace the value of in-person interactions for enhancing your skills, fostering deeper engagement, and maximizing memory retention. Join us for this dynamic, interactive workshop, and take your expertise in maintenance sales to new heights.

## Foundations of Project Sales

*An expanded version of SPGroup's Project Sales Training, Beginning November 2025.  
In-Person session in Denver, CO.*

### **Program Overview:**

The **Foundations of Project Sales** is a comprehensive training program designed to equip project sales representatives with the skills and knowledge to excel in their role. This expanded version includes a three-week blend of online learning and virtual instructor-led sessions, followed by an intensive three-day in-person workshop. The training will cover the essential stages of the project sales process, from prospecting to closing, and will focus on key competencies such as selling on value, professional presentations, negotiation, and effective closing techniques. This program is tailored specifically for project sales, differentiating it from maintenance sales by honing in on project-based selling strategies and cycles.

### **Target Audience:**

Project sales representatives seeking to enhance their abilities in prospecting, qualifying, and closing project-based deals.

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### **Program Structure:**

#### **Phase 1: Online Learning & Virtual Instructor-Led Sessions (3 Weeks)**

The first phase consists of self-paced online learning modules combined with live, virtual instructor-led sessions twice a week to facilitate real-time interaction and Q&A. Each week will focus on a core set of sales skills and will require participants to engage in practical exercises that they can apply immediately.

#### **Phase 2: In-Person Workshop (3 Days)**

Following the online component, participants will come together for a three-day in-person workshop. This workshop will be hands-on, with real-world scenarios, role-plays, and collaborative problem-solving to solidify the skills learned in the virtual sessions.

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## Key Topics Covered:

The **Foundations of Project Sales** program focuses on essential skills for project sales representatives, starting with **prospecting and securing meetings**. Participants will learn how to identify high-value prospects within their markets and customer base and leverage targeted outreach techniques to engage decision-makers.

In the second week, the program emphasizes **qualifying prospects** by asking the right questions to uncover project needs, budgets, and timelines, while also understanding the extended **project sales cycle**. This ensures sales reps align their activities with the customer's decision-making process.

The final week of online learning covers **value-based selling** and **professional presentation skills**, teaching participants to differentiate their offerings by emphasizing ROI and long-term benefits over price, while also mastering how to deliver professional, impactful presentations.

## In-Person Workshop

The **in-person workshop** serves as a hands-on extension of the virtual training, allowing participants to apply the concepts they've learned in real-world scenarios. It focuses on deepening skills in advanced prospecting, qualifying high-value project opportunities, and managing the complexities of long project sales cycles.

Participants will also refine their negotiation tactics and closing techniques, ensuring they can handle objections, maintain value in negotiations, and confidently close deals. The workshop culminates in a comprehensive project sales simulation, where participants work through the entire sales process—prospecting, qualifying, presenting, negotiating, and closing—while receiving feedback to sharpen their approach.



## Virtual Programs

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### CRM Success Workshop: Building Your Sales Tracking System

*Kick-off Session: November 13, 2024, 1:00 PM EST*

**You cannot manage what you do not measure.** Without a proper CRM system to track and diagnose your sales team’s performance, all other training and coaching efforts fall short of their full potential. As a Sales Leader, your ability to accurately track key metrics—appointments, proposals, closed deals, and deal size—determines whether your team’s efforts lead to measurable growth or missed opportunities.

The **CRM Success Workshop** is designed to help you implement a CRM system that provides full visibility into your team’s sales process while equipping you to forecast future needs and identify potential threats before they impact your pipeline. By tracking every stage of the sales process, you’ll gain critical insights into where your reps are excelling and where they need more support.

#### **Benefits of a Well-Implemented CRM:**

- **Increased Sales Efficiency:** A good CRM automates routine tasks like follow-up emails, meeting reminders, and pipeline updates, freeing up your reps to focus on what matters most—selling.
- **Improved Organization:** Reps can easily track their opportunities and stay on top of deals in progress, ensuring no leads slip through the cracks.
- **Actionable Insights:** With built-in reporting tools, you’ll be able to measure performance in real time, forecast future needs, and anticipate potential challenges.
- **Enhanced Pipeline Visibility:** Understand exactly where each opportunity stands, which stages of the sales cycle are working, and which are being skipped.
- **Better Forecasting:** Use your CRM to predict future sales, identify bottlenecks, and strategically plan for both growth and challenges.

In this multi-part virtual series, you will learn how to set up a CRM that empowers your team to stay organized, operate efficiently, and close more deals—giving you the data needed to make informed decisions and drive long-term success.

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## **Workshop Overview**

The workshop kicks off on November 13, 2024, with a live virtual session to set expectations and guide you through selecting the right CRM platform for your business. You'll have 1.5 months to choose a CRM system, during which we will provide resources and recommendations to help you find the best fit.

## **Choosing Your CRM**

You may opt to use Microsoft Excel as your CRM for this workshop, and the same core principles will apply throughout the training. While Excel won't offer some of the automation features common in dedicated CRM platforms, we will provide you with manual processes to achieve similar outcomes. You'll still be able to effectively track sales metrics, manage leads, and organize your sales pipeline, ensuring you get the most out of this training—regardless of the platform you choose.

Once you've selected and sign up for your CRM, the real work begins! Starting in January 2025, we will hold weekly 1-hour virtual sessions designed to walk you through the key steps of setting up and optimizing your CRM for maximum sales impact.

## **Workshop Sessions**

1. **Kick-off & CRM Selection Guidance (November 13, 2024)**
  - Introduction to CRM and sales metrics
  - Expectations for the workshop
  - CRM platform recommendations and selection tips
2. **Session 1: CRM Setup – Users, Permissions & Roles**
  - Learn how to add users, assign permissions, and structure your CRM to reflect your sales team's hierarchy.
3. **Session 2: Lead Management & Setting Up Key Fields**
  - Set up your CRM to track each stage of your sales process, from appointments to closed deals.

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#### 4. **Session 3: Activity Tracking & Workflow Automation**

- Automate your sales pipeline and track rep activities to ensure nothing slips through the cracks.

#### 5. **Session 4: Setting Up Email Campaigns**

- Integrate email campaigns with your CRM to nurture leads and keep prospects engaged.

#### 6. **Session 5: Reporting & Measuring Results**

- Build reports and dashboards to track key sales metrics like deal size, conversion rates, and win rates.

#### 7. **Final Session: Q&A, Optimization & Ongoing Strategy**

- A live Q&A session to troubleshoot issues and share tips for continuous CRM optimization.

### **What You'll Gain**

By the end of this workshop, your CRM will be fully equipped to:

- Track how many appointments are set weekly, and how many turn into surveys, proposals, and closed deals.
- Track deal size and analyze pipeline trends.
- Identify which stages of the sales cycle are being skipped or underperforming.
- Automate repetitive tasks and streamline communication with prospects.

This is an invaluable opportunity for SPGroup members to ensure their sales teams are tracking performance, optimizing workflows, and driving better results.

### **Who Should Attend:**

This workshop is ideal for sales leaders, sales operations managers, and team members who are responsible for implementing and maintaining sales tracking systems.

## The Communications Series

*6-Part Webinar Series | Weekly Sessions Beginning in February*

Effective communication is the cornerstone of success in any service company, yet it's often the biggest source of frustration and inefficiency. Misunderstandings between the field and the office, poor cross-departmental collaboration, and unclear customer interactions can lead to operational setbacks.

**The Communications Series** is designed to address these challenges head-on by providing participants with practical, actionable tools to improve communication in their day-to-day roles. This 6-part series is focused on skill-building, helping professionals from all levels of the organization develop techniques they can use immediately to enhance clarity, resolve conflicts, and foster stronger relationships across teams and with customers.

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### What You'll Learn:

Each session is packed with hands-on exercises, real-world examples, and actionable takeaways that will empower you to be a more effective communicator. You'll learn to adapt your communication style to different personalities, master active listening, write clearer emails, and handle tough conversations with confidence.

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### Session Topics:

- **Week 1: The Foundation of Effective Communication** covers essential skills like clarity and confirming understanding, setting the tone for practical application throughout the series.
- **Week 2: Understanding Communication Styles and Personalities** helps participants become more adaptive communicators, able to flex their style to suit different individuals and situations.
- **Week 3: Mastering Active Listening** focuses on one of the most important communication skills—listening—by giving participants specific tools and exercises they can use right away.

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- **Week 4: Overcoming Written Communication Challenges** teaches the fundamentals of effective written communication, focusing on emails, messaging, and reports where miscommunications are common.
  - **Week 5: Conflict Resolution Through Communication** provides a framework and practice for resolving conflicts, which is one of the most challenging aspects of workplace communication.
  - **Week 6: Building Your Personal Communication Action Plan** ensures participants leave with a personalized roadmap for improving their communication skills over time, helping them maintain momentum beyond the series.
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**Who Should Attend:**

This series is ideal for professionals at all levels who are looking to improve their communication skills. Whether you're in the field, at the office, managing teams, or engaging with customers, this series will provide you with tools to be a more effective communicator and problem-solver.

## Leadership Book Club: Learning & Growing Together

In 2025, SPGroup will be launching a Leadership Book Club as part of our commitment to continuous learning and development. Each quarter, we will focus on a carefully selected book aimed at enhancing leadership skills, fostering collaboration, and promoting strategic thinking. The book club will not only allow participants to explore new ideas, but it will also encourage leaders to engage deeply with the material by presenting and teaching key insights.

### 2025 Book Club Selections:

1. **Q1: The 5 Dysfunctions of a Team** by Patrick Lencioni  
This classic focuses on the five common pitfalls that prevent teams from reaching their full potential, providing a practical framework for building stronger, more cohesive teams.
2. **Q2: How to Win Friends and Influence People** by Dale Carnegie  
A timeless guide to interpersonal relationships and communication, this book offers valuable lessons on how to build strong, positive relationships both inside and outside the workplace.
3. **Q3: Think and Grow Rich** by Napoleon Hill  
A landmark work in personal success literature, this book explores the mindset and principles that drive wealth creation, motivation, and goal achievement.
4. **Q4: Seeing the Big Picture** by Kevin Cope  
Focused on financial literacy for leaders, this book helps readers understand how business decisions impact financial performance, equipping them with a big-picture perspective that is crucial for making strategic decisions.

### How it Works:

Each book will be divided into chapters or sections, with leaders from each SPGroup member company taking turns to present and lead discussions on specific topics. This not only provides an opportunity for different leadership styles and perspectives to shine but also deepens learning through teaching.

As the well-known principle states:

**"The best way to learn something is to teach it."**

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By presenting the material, leaders will reinforce their own understanding and help others gain fresh insights. This collaborative approach ensures a richer, more engaging experience for all participants, fostering both personal and professional growth across our leadership community.

### **Leadership in All Capacities**

At SPGroup, we recognize that leadership is not defined by a title. Everyone has the potential to lead in their own capacity, whether they are managing teams or leading by example within their role. Therefore, this book club is not limited to individuals with a manager's title—it is open to all members who want to enhance their leadership skills and contribute to the collective growth of our organization.

We believe that leadership is about influence, vision, and the ability to inspire others, regardless of formal authority. This book club provides an inclusive space for anyone who wants to improve themselves, learn from others, and share their unique perspectives.

We encourage all SPGroup members, no matter their role or title, to join in, as this initiative is designed to enhance not just individual leadership capabilities, but the overall strength of our teams and organizations.

We look forward to a year of learning, teaching, and growing together!

## Service Coordinators Workshop

*Beginning October 2025 | Virtual*

**Workshop Overview:** The Service Coordinators' Workshop is designed to provide service coordinators with the essential skills they need to excel in their role. This 6-week virtual program will focus on enhancing communication, conflict resolution, prioritization, and the ability to serve as an effective liaison between customers, technicians, and the company. Each week will feature two engaging virtual training sessions followed by real-world practice (homework). The subsequent sessions will include follow-up discussions on the practical application of learned skills. This interactive approach allows participants to absorb theory and then immediately put their knowledge into action.

### **Workshop Structure:**

- **Format:** 6 weeks, virtual learning and homework (practical application)
- **Weekly Schedule:** 2 virtual sessions per week (1-hour each), followed by practical homework
- **Follow-up:** Weekly recap on practical application and progress before diving into the next topic

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### **Week 1: Role Clarity & Bridging the Gaps**

- **Objective:** Understand the pivotal role of a service coordinator as the middleman between the customer, technicians, and internal teams.

### **Week 2: Effective Communication Skills**

- **Objective:** Establish clear, concise, and professional communication techniques.

### **Week 3: Prioritization & Time Management**

- **Objective:** Learn how to prioritize tasks and manage time effectively, ensuring smooth operations.

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**Week 4: Conflict Resolution**

- **Objective:** Develop the skills to handle conflict professionally and diplomatically, whether it's with customers or internal team members.

**Week 5: Customer Relations & Managing Expectations**

- **Objective:** Build strong relationships with customers and manage their expectations effectively to enhance customer satisfaction.

**Week 6: Problem-Solving & Critical Thinking**

- **Objective:** Enhance your problem-solving abilities by developing a critical thinking approach to unforeseen challenges.

**Final Wrap-Up & Reflection:** At the end of the 6-week workshop, participants will reflect on their progress, share key takeaways, and discuss how they will continue to apply these essential skills in their role.

## Sales Growth Clubs

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### Prospecting Academy

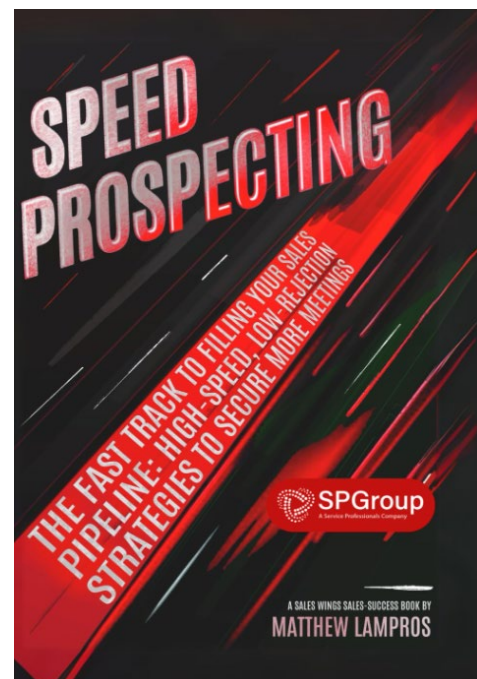
Weekly Beginning January 2025. Sign-up now and attend for free through December. First two sessions free without sign-up.

Fee: \$1,600 per year per rep, a 37% savings. Managers are free with attendee.

**"SPGroup and Sellemental are proud to announce the release of the SPGroup edition of *Speed Prospecting* along with the creation of the exclusive Prospecting Club for SPGroup sales reps.** This tailored edition is included as part of your SPGroup membership and is packed with insights to help sharpen your prospecting skills and drive better sales outcomes.

The Prospecting Club offers a full year of hands-on support, including access to:

- **Weekly 4Minutes4Me videos:** Actionable prospecting tips delivered in bite-sized formats to keep your team on track.
- **Exclusive online bookcase:** Full, exclusive, access to Matthew Lampros' entire library of prospecting books and resources.
- **Regular updates:** Fresh buzzwords, scripts, and golden hour strategies based on the latest market trends.
- **SPGroup-only office hour:** Get personalized coaching and support with dedicated weekly sessions.
- **Leaderboard & prizes:** Stay motivated with friendly competition and the chance to win prizes for top performance.



This partnership is designed to help SPGroup sales teams prospect more efficiently, book more meetings, and with the SPGroup sales framework, close more deals. We are excited to bring this unique opportunity to you as part of your SPGroup membership!



## Closers Academy

*Weekly on Wednesdays at 3:30 EST all year beginning November 5, 2024*

Hosted by Nicole Bass and Al Lindeman, primary educators for the Foundations of Maintenance Sales Program, "The Closers Academy" offers a valuable weekly opportunity for your sales reps to receive expert coaching and guidance. This optional session, which now includes participation from SPGroup Certified Sales Leadership Professionals (CSLPs), serves as a strategic touchpoint, helping reps fine-tune their approach and close more deals.

In this open-door session, reps and managers can drop in anytime during the hour to get personalized support, including:

- Assessing whether an opportunity is properly qualified
- Developing a tailored closing strategy
- Assistance with cost of operations calculations
- Building or reviewing executive summaries and proposals
- Real-world scenarios to reinforce the importance of finding 3 reasons to make a change

These weekly meetings provide ongoing reinforcement of key concepts and strategies, ensuring your team is fully prepared to close more deals and boost success. Whether you are an experienced closer or a sales professional seeking to sharpen your skills, drop in anytime, stay as long as you need, and walk away with actionable insights to help you succeed.

## SPGroup Membership Tiers

Detailed membership inclusions & exclusions are provided on the following pages.

Membership Inclusions	Platinum Member	Gold Member
Online Training & Resource Center	✓	✓
Benchmarking Survey Participation	✓	✓
Sales Contest Participation	✓	✓
JoinTheTrades.com Listing	✓	✓
Principal's Meetings	✓	✗
Early Access Registration	✓	✗
<b>Exclusive Territory</b>	✓	✗

Discounts		
SPGroup Event Registration Fees	Included	20%
SPAcademy & SPConnect Licenses	50%	20%
OJT Logbook Licenses	50%	20%

Investment		
Onboarding & Set-Up	\$4,750	\$3,500
Monthly Dues	\$4,350	\$1,100

Requirements		
Annual Revenue Minimum	\$8M	N/A
Contract Term	3 Years	2 Years

The **Platinum+** tier (not shown above) includes everything from the Platinum tier as well as up to 50 licenses for SPAcademy and OJT Logbook for \$6,250 per month.

## SPGroup Membership Details

### Inclusions

#### **Online Training & Resource Center**

This feature offers a comprehensive library of job tools and resources designed for sales professionals, management, and service coordinators. It also provides access to the online components of our multi-week programs, including Maintenance Sales, Project Sales, and Service Leadership. Additionally, the platform consolidates industry resources from various content providers, ensuring your teams have everything they need in one convenient location.

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#### **Benchmarking Survey Participation**

Participating in benchmarking surveys allows members to compare their company's performance with other SPGroup members. These surveys gather key performance metrics, providing valuable insights into market trends, operational efficiencies, and business growth opportunities. Members can use the data to identify areas for improvement and track their progress over time.

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#### **Sales Contest Participation**

Members have the opportunity to engage in SPGroup's exclusive sales contests. These competitions are designed to motivate and challenge sales teams, encouraging them to meet or exceed targets. Rankings are published monthly and the Top 10 winners are recognized on stage at the annual LEADSeminar.

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#### **JoinTheTrades.com Listing**

Members receive a listing on **JoinTheTrades.com**, an online career fair of skilled trades employers with an audience of over 85,000 through social media. This listing boosts visibility and credibility, allowing members to reach potential employee candidates more effectively.

### **Principal's Meetings** *(Platinum Only)*

Principal's Meetings offer exclusive access to high-level, face-to-face gatherings with key industry leaders and decision-makers. These meetings provide a forum for strategic discussions, networking, and sharing insights about industry trends, business challenges, and growth strategies. It's a unique opportunity to engage with peers and experts to shape the future direction of your business.

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### **Early Access Registration** *(Platinum Only)*

This feature allows members to register for SPGroup events before general registration opens to the public. Early access ensures that members can secure spots at important events, workshops, and conferences that often have limited seating. It also allows for better planning and access to high-demand sessions or activities.

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### **Exclusive Territory** *(Platinum Only)*

Members who receive an exclusive territory benefit from reduced competition within a designated geographic area. This feature ensures that no competitors within your assigned territory will gain access to SPGroup training or resources, helping you maintain market dominance and capitalize on opportunities without the pressure of direct competition.

## Exclusions

While SPGroup membership provides access to valuable resources, training, and events, the following expenses and services are **not covered** and are the responsibility of the member:

- **Hotel and Travel Expenses:** SPGroup reserves hotel rooms on behalf of members and their teams for all training events. However, members are responsible for covering the cost of these accommodations. Teams will be required to provide a credit card at check-in or complete a credit card authorization form in advance to settle the charges.
  - For most events, hotel rates range from **\$180 to \$250 per night**.
  - For **Principal's Meetings**, hotel rates range from **\$350 to \$600 per night**, with room upgrade options available.
- **Meals Outside of SPGroup-Provided Meals:** While SPGroup provides certain meals during events, any additional meals not provided by SPGroup will be the responsibility of the member.
- **1:1 Consulting Services or Formal Business Studies:** SPGroup maintains **regular communication** with member company owners and sales managers, offering advice and guidance when needed. We are always available to discuss strategies, share insights, and provide support. However, this communication is **informal** and is not part of a structured coaching program or formal business study. For members seeking more in-depth, individualized consulting services—such as regular 1:1 coaching sessions or comprehensive business consultancy—we can refer you to our partners at **Anavo Growth Partners**, who specialize in these services.

## Discounts

### **SPGroup Event Registration Fees**

Members benefit from reduced or waived registration fees for SPGroup-hosted events, such as conferences, workshops, and networking gatherings. Platinum members enjoy fully covered event registration fees, while Gold members receive a 20% discount. These events are key opportunities for learning, networking, and staying updated on industry trends, and the discounts make participation more affordable.

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### **SPAcademy & SPConnect Licenses**

SPGroup offers members discounted access to **SPAcademy**, a technician training platform and Department of Labor approved apprenticeship curriculum.

Learn more at [www.SPAcademy-HVAC.com](http://www.SPAcademy-HVAC.com).

Members also receive discounts to **SPConnect**, an online platform for pricing Service Agreements, generating proposals & agreements, and tracking sales activity. Contact your SP representative to learn more.

Platinum members receive a 50% discount on both SPAcademy and SPConnect licenses, while Gold members enjoy a 20% discount.

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### **OJT Logbook Licenses**

The **OJT (On-the-Job Training) Logbook** is a tool that helps members track and document training for their employees, ensuring compliance and skill development across the organization. Members can purchase licenses at discounted rates—50% off for Platinum members and 20% off for Gold members—making it easier to implement structured, effective training programs while reducing costs.

Learn more at [www.OJTLogbook.com](http://www.OJTLogbook.com)



## Investment

- **Onboarding & Set-Up:** This one-time fee covers the initial costs of integrating your company into the SPGroup ecosystem. It includes personalized onboarding support, system setup, and access to company-branded resources to support your sales teams.
- **Monthly Dues:** The monthly dues represent the ongoing cost of membership, providing continuous access to SPGroup resources, events, discounts, and support. All dues are billed quarterly.

## Member Requirements

### Annual Revenue Minimum

The **Annual Revenue Minimum** is the threshold a company must meet in order to qualify for certain membership tiers. For **Platinum Members**, a company must generate at least \$8 million in annual revenue to be eligible. This requirement ensures that Platinum members are of a similar scale, fostering a peer network of comparable business leaders who share similar challenges and opportunities. There is no annual revenue minimum for **Gold Members**, making this tier accessible to businesses of varying sizes.

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### Contract Term

The **Contract Term** specifies the minimum length of commitment required for each membership tier. For **Platinum Members**, a 3-year contract is required, reflecting the long-term nature of the benefits and partnerships available at this level. For **Gold Members**, the contract term is 2 years, offering a slightly shorter commitment while still providing access to a wide range of benefits.