



# MSCA18✈ SOAR!

**PROGRAM BOOK**

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United Technologies  
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# MESSAGE FROM THE CHAIR



Welcome to MSCA18 and the dazzling Hyatt Regency Huntington Beach Resort and Spa. It is hard to believe but this year marks our 33<sup>rd</sup> educational conference. Throughout the decades, the topics and sessions that have been presented have adapted along with the advent of new ideas and technological advances but the overall mission of the conference has remained true — to inspire you to grow and succeed and provide you with the tools needed to advance your business to the next level. This year’s conference is sure to do just that. The incredible amount of knowledge and expertise surrounding you this week is endless— from revolutionizing technology, maximizing your online engagement, building exceptional leadership skills, protecting your business and dealing with people, to name a few.

The education session lineup, keynote speakers and peer group forums have been designed to accelerate your growth, transcend your climb and open your mind to rise above, to scale new heights and to SOAR! Learn from industry expert manufacturers and suppliers about relevant and innovative technologies at the Exhibitors Display. Engage, network and collaborate with your peers through a vast array of educational and social events. Soak in all this week has to offer, relax, recharge and regenerate your mind, body, soul and business — and fly.

MSCA would like to thank each of you for attending this year’s conference. Your devotion to continued industry excellence is what inspires us to exceed your expectations year after year. Our relationship with our UA partners is paramount to our success as mechanical service contractors and we are so pleased that so many UA officials have joined us this week. MSCA also extends its thanks to all our conference sponsors and exhibitors, some of whom have supported us for many years and others that are just joining this dynamic family.

I challenge you to take advantage of the endless learning opportunities available this week and to leave here with new ideas that you can implement in your business. Let our educational sessions, peer group forums, and key notes inspire you to reach higher and SOAR for nothing less than excellence!

Jaimi Lomas  
Chair, Board of Managers





# REGISTRATION & INFORMATION

**MSCA's Conference Registration & Information Desk will be located in the Grand Foyer East. Registration & Information hours are:**

|                              |                           |
|------------------------------|---------------------------|
| <b>Sunday, October 21</b>    | <b>1:00 pm – 7:00 pm</b>  |
| <b>Monday, October 22</b>    | <b>7:00 am – 5:00 pm</b>  |
| <b>Tuesday, October 23</b>   | <b>7:00 am – 12:00 pm</b> |
| <b>Wednesday, October 24</b> | <b>7:00 am – 3:00 pm</b>  |

**At the Registration & Information Desk, you will receive:**

- Your name badge and tickets for the optional events for which you have pre-registered
- Conference program book (*courtesy of NIBCO INC.*)
- Notebook (*courtesy of American Technical Publishers*)
- Name badge lanyard (*courtesy of Penta Technologies*)
- Beach bag (*courtesy of Viega*)
- Tech giveaway (*courtesy of KEY2ACT*)
- Beach mat (*courtesy of Nu Flow Technologies*)
- Tri-function pen (*courtesy of Marking Services, Inc.*)
- Reusable water bottle (*courtesy of Carrier Corporation*)

**Thanks also to the following sponsors for:**

- Conference signs (*courtesy of COINS*)
- WiFi connection (*courtesy of ServiceTrade*)

**The registration area will also be the place to register for the 6th Annual MSCA/LAARS – A Bradford White Company Sun Run, if you have not already pre-registered.**



**Need More Information? Find it on the MSCA18 App. Find the app with keyword MSCA18 in the Apple or Google Play stores. Only on the App can you:**

- Access the attendees list and message other conference attendees\*
- View the schedule of events
- Browse peer group forums
- Create your own personal schedule
- Download speaker handouts
- View the exhibit hall map and access exhibitor websites
- Receive important announcements and updates
- Complete conference critique and enter for the chance to win awesome prizes!

**\*Note:** You must log into the app with your registration email and password: MSCA18 to access the attendees list and attendee information.

## A Special Note About Badges

Your badge is your admission ticket to all conference activities, including education sessions and social events. Badges must be worn to all conference events.

If you have any questions about the conference or MSCA, just look for individuals wearing the blue “Connect with Me” buttons. These are our MSCA board and committee members who will be glad to answer any of your questions. You can also visit the conference Information Desk for assistance.

**\*To log into the conference WiFi search for network name MSCA18 and use password servicetrade (all lowercase and no spaces).**





# ABOUT MSCA CONNECT

Sponsored by MILWAUKEE TOOL

**MSCA CONNECT.** The epicenter for the entire conference, where you will be able to connect with your peers and friends and find many useful services and resources. This area is perfect for gathering, recharging devices, or catching up on email. It is also the site of the Registration & Information Desk where you can get all your conference questions answered.

**The ConTechCrew Podcast.** Join the ConTechCrew from JBKnowledge each day for a discussion of innovations you can use to become more productive and profitable. You'll also hear about the latest technology products, software and tools from leading contractors who are harnessing these solutions.

**MSCA Genius Bar.** Have a question about any of your personal devices – including phones, tablets or laptops? Having problems downloading the MSCA app? An MSCA tech pro will be on hand to assist with your questions and make sure you stay connected throughout MSCA18.

**Charging Station and Computer Kiosks!** The place to get powered up and check in.

**What's Your Number?** How many MSCA conferences have you attended? Check out the display near Registration to see a full list of past MSCA conferences (33 in total!) and grab a sticker to display your number. Have fun finding out who has attended the most conferences! And make sure you extend a special greeting to those displaying number “1” as these are our lucky first-timers!

**Get your “Challenge Accepted” Pin!** Sometimes it takes only a minute to take a look at your business and find some answers to the questions that have been haunting you. Stop by the podcast booth and take part in the **MSCA Minute Technology Challenge**. Answer 10 rapid fire questions about your current technology situation—you get just 60 seconds to answer! This quiz will give you quick insight to how you compare to your industry peers when it comes to technology and allow us to assess the current technology needs and challenges of MSCA members. JBKnowledge will be administering the challenge and provide complimentary advice on all things tech. Leave with a clearer understanding of what you can implement in your business right away and your “Challenge Accepted” pin — Are you up for the challenge?

**Safety Resource Desk and SDS Binderworks.** Here you can get information on all of MSCA's safety resources available as free downloads to members. SDS Binderworks is the Association's preferred safety data sheet service which helps to reduce costs and time associated with SDS-related efforts and keeps the compliance process simple and convenient.

**MSCA Sales Institute Display.** Learn more about our service sales programs and get details on our 2019 courses. MSCA sales programs include sales leadership training, sales basecamp for new sales personnel and advanced sales training for those with several years of experience. These customized training programs are the only sales-specific training courses developed specifically for the HVACR and plumbing service industry.

## CONFERENCE PROGRAM SUNDAY, October 21

### Bonus Program

**Get a Grip on Your Business: Are you Running Your Business or is it Running You?**  
Featuring Tom Bouwer



**7:30 am – 12:00 pm**

### Salon C

*Pre-registration is required. Breakfast, session workbook and a copy of the book “What the Heck is EOS?” are included.*

If you'd like to be in more control of your organization, you're not alone. As thousands of business leaders have discovered, the key to faster growth, bigger profits, more loyal customers and fewer frustrations is EOS®. EOS (Entrepreneurial Operating System) is a comprehensive business system with real, simple, practical tools. This presentation will help participants learn to implement a simple “way of operating” that helps leadership teams clarify, simplify and achieve their vision.

In this value-packed workshop, attendees will learn to see their businesses in a whole new light and to achieve better results through strengthening the Six Key Components™ of a truly great organization. The outcome creates alignment and synchronizes all the pieces of your business to produce the results you want.

Tom Bouwer is co-author of What The Heck Is EOS? with EOS founder, Gino Wickman. Using his energetic style, he is a sought-after speaker with extensive experience in helping business leaders get what they want from their organizations. Tom delivers high-value engagements that have actionable takeaways. A top-ranked Vistage speaker, Tom presents internationally to the CEO and C-level members of world-class executive organizations. His nearly three decades of global management and consulting experience in multiple industries help him quickly identify chronic issues that keep a company from achieving optimal success.

### Attendee Value and Takeaways:

- Review the Six Key Components of top companies
- Learn a powerful tool to clarify and achieve your vision
- Work with two simple tools that will get the right people in the right seats
- Build the right company scorecard to deliver an absolute pulse on your business
- Master practical tools that successful entrepreneurs use to get more done



# SUNDAY, October 21

**1:00 pm – 7:00 pm**  
**Registration & Information Desk**  
**Grand Foyer East**

**3:00 pm – 7:00 pm**  
**Exhibitor Set-up**  
**Mariners Ballroom**

**5:30 pm – 6:30 pm**  
**First Timers Reception** *Sponsored by DataBasics*  
**California Courtyard**

All first-time attendees are invited to this meet and greet welcome reception. MSCA's officers and committee members will host the event and explain how best to navigate the week's events so that you can get the most out of your time at the conference.

**7:00 pm – 9:00 pm**  
**Welcome Sunset Reception** *Sponsored by Quantech*  
**Lighthouse Courtyard**

Join us for a fun, casual gathering under the setting California sun to connect with your peers, make new friends and reconnect with familiar faces as you enjoy delectable food and refreshing cocktails with the stunning beach as your backdrop. Here you will have an opportunity to meet former Thunderbird pilot, Colonel Nicole Malachowski, (USAF, Ret.), who will be our special guest speaker at the opening session. And, if you are lucky, you would have seen the Thunderbirds fly overhead earlier in the day during the Huntington Beach Air Show. What a perfect way to kick off your conference experience!



# MONDAY, October 22

## Supplier Partnership Day

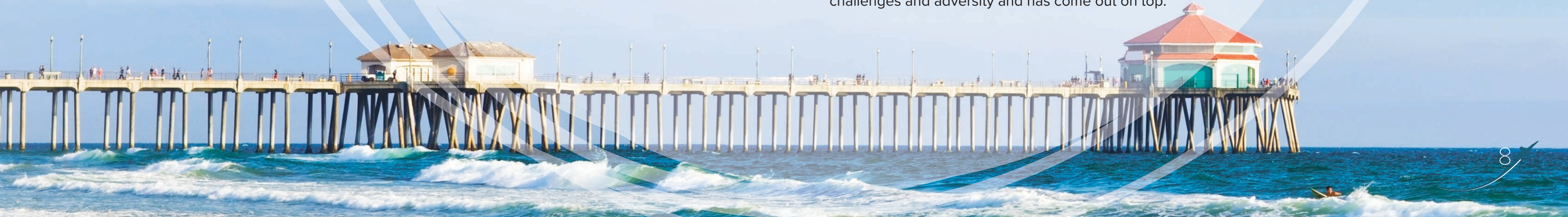
**7:00 am – 5:00 pm**  
**Registration and Information Desk**  
**Grand Foyer East**

**7:00 am – 8:00 am**  
**Breakfast**  
**Lighthouse Courtyard**

**8:00 am – 9:30 am**  
**Opening Celebration**  
**Featuring Colonel Nicole Malachowski (USAF, Ret.)**  
**Salon DEFG**

MSCA Board of Managers Chair, Jaimi Lomas will be your host for our opening celebration as she welcomes attendees and kicks off an amazing week. Then be prepared to be inspired and awed as special guest, **Colonel Nicole Malachowski (USAF, Ret.)**, delivers an impactful talk on harnessing the headwinds of change. In flying, headwinds slow you down. At their worst, they cause you to change your plans and impact the effectiveness of weapons in combat. Headwinds demand that pilots be resilient and resourceful, literally on the fly. Colonel Malachowski's message will inspire you to think differently about the headwinds of change we all face – organizationally and personally. She will encourage you to rise above and ascend to a level that is unparalleled – to fly is to SOAR. Drawing on her extraordinary Air Force career, Nicole will candidly offer lessons on leadership, followership, and overcoming adversity. She will help ignite your own indomitable spirit in order to succeed far beyond what you have ever dreamed.

Colonel Nicole Malachowski (USAF, Ret.), was the first woman to fly on any Department of Defense military jet demonstration team. As a former fighter squadron commander and mission-ready pilot in three operational fighter squadrons and the first woman Air Force Thunderbird Air Demonstration Squadron pilot, Nicole learned to Harness the Headwinds of Change. Nicole brings her experience to the stage and holds audiences spellbound with an easygoing authenticity of someone who's achieved greatness. She's been a member and leader of exceptional teams. She has faced overwhelming challenges and adversity and has come out on top.







**MSCA welcomes all of this year's conference sponsors and exhibitors, and thanks them for their continued support. MSCA extends a special thank you to our 2018 sponsors for their generous support and contributions.**

- Abstrakt Marketing Group
- American Technical Publishers – *Notebook Sponsor*
- Appion Inc.
- Asahi/America, Inc.
- Automated Integration
- Bitzer US, Inc.
- BuildingAdvice, Inc.
- Building Start
- Capitol Energy Systems
- Carrier Corporation – *Reusable Water Bottle Sponsor*
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- CopperTree
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- Thermaduct
- Topcon Positioning Systems
- United Association Training
- United Refrigeration, Inc.
- Viega – *Beach Bag Sponsor*
- Viewpoint Construction Software
- XOi Technologies

**9:30 am – 12:00 pm**

**Exhibitors Display**  
**Mariners Ballroom**

Connect with your industry's leading suppliers and learn about the latest HVACR and plumbing products and services at this year's Exhibitors Display. The Exhibitors Display is your opportunity to meet with the industry's key suppliers one-on-one to discuss your company's needs and check out their newest innovations and technologies. Don't forget, for a complete list and description of our exhibitors, go to our MSCA18 App and just look for the Exhibitor icon. And be sure to stop by the Donut Doors, sponsored by Lifting Gear Hire, for a tasty treat!

**10:00 am – 11:30 am**

**Spouse Program – Fitness Fun (Pre-registration Required)**  
**California Courtyard**

Registered spouses are invited to take some time to relax and regenerate from all the stresses that life throws at us each day. During this program, spouses will have the opportunity to enrich their mental and physical well-being with a variety of stimulating workouts. Three unique specialty classes; HIT (high intensity training), Core and Yoga will be offered. Each session will be packed with a series of fun, dynamic exercises designed to tone, strengthen and increase cardio fitness levels. This is a result-driven program for participants of all fitness levels. Sign up at the MSCA Registration/Information Desk.

**12:00 pm – 1:00 pm**

**Luncheon**  
**Lighthouse Courtyard**

**12:00 pm – 2:30 pm**

**Women in the Mechanical Industry**  
**Luncheon and Peer Group Forum**  
**Sandpiper**

Meet and network with some of the women leaders in the mechanical service industry. Participate in an open discussion on career development opportunities, share ideas and challenges, and help us shape the future of Women in the Mechanical Industry. All women executives and employees of member companies and supplier partners are invited to attend. The luncheon will begin at noon followed by the peer group forum.



**WOMEN *in the***  
**MECHANICAL**  
**INDUSTRY**





1:00 pm – 2:30 pm

Peer Group Forums I

Understanding the  
Emerging Crisis in Water  
Quality: The UA's New  
Water Quality Program

Kurt Steenhoek  
Rich Benkowski  
Chris Carter  
*Huntington Ballroom South*

Learn how the UA/MSCA is responding to the emerging crisis in water quality. North America's water delivery infrastructure requires major improvements including the replacement of many aging systems. This critical need impacts all water sources, pipes, faucets, heating and cooling, and fire protection systems. This crisis has created a need for water quality management and remediation services. During this session you will learn how the UA Water Quality Program will prepare you and your employees to deliver fundamental services for compliance with the recent government mandate as it relates to piped systems in healthcare and skilled nursing facilities. This program will ensure your UA workforce can identify and remediate risks to crucial water systems.

Best Practices in Deploying and  
Managing Mobile Devices

Steve Metzmann  
*Fountain East*

Mobile devices are now indispensable tools for mechanical contractors. Come learn today's best practices for deployment and content distribution through Mobile Device Management for all devices. Understand Apple's new, free business deployment platform replacing DEP and VPP. See a deployment step-by-step and learn how to choose among leading MDM's.

Using Building Data as a  
Competitive Advantage

Rich Happel  
Scott Berger  
*Seacliff*

Arguably the next big trend to hit our industry is the use of building data to better serve our customers. Join us for an enlightening conversation about the tools currently available and future technology in Building Data Analytics. We'll discuss how to use it to gain, retain and increase the profitability of customers as well as how to truly differentiate your company.

Culture Trumps Talent

Steve Thomas  
Jim Bartolotta  
*Shoreline*

The culture of any organization, from a large company to a small family, is what makes that organization effective. It has impact on everything we do, everything we are and everything we become. Yet it is the one thing we seem to have the toughest time building and maintaining. Culture is defined by the individuals on your team...their personalities, their values, and their weirdness. We'll talk about how to create a culture in which people can come to work and be the best version of themselves, which, incidentally, is the goal of leadership.

The Untold Truths About Sales

Dave Bavisotto  
Wayne Turchetta  
*Driftwood*

Join leading sales experts for a revealing discussion on some of the secrets to service sales success. Topics to include: full coverage vs. scheduled quarterly PMAs, average PM hours per service tech, developing a simplified score card to boost sales, and other best practices.

Recruiting and Service Training:  
The Portland, OR Success Story

Sean Fogli  
Frank Wall  
*Fountain West*

Join forward-thinkers from Portland, OR to hear how they have been successful in attracting experienced talent through a creative recruiting campaign and building a strong management/Union partnership. Learn how their relationship with their local service organizers was built on open communication, clear expectations and the ability to provide feedback on new hires. Also hear how they have been able to implement a service specific training curriculum, which includes accreditation, to ensure the highest quality technician is being turned out. The success is in the numbers and this area has the results to prove it.

Empowering Techs Beyond Their  
Tools: The Value of Technician/  
Customer Relationships

Sean Hamilton  
Al May  
*Sunrise Foyer*

This session will focus on what companies are doing to empower their technicians to become "Trusted Advisors". Through impactful communication, proactive repairs, and quoting directly to the customer, this session will dive into how companies are earning customer loyalty and increasing their revenue through enhancing their technician/customer relationships.

Exit Strategies and  
Succession Planning

Bob Dills  
Dick Starr  
*Sunrise*

Do you see your company as one which will go on forever into the future? If so, how are you preparing for that? What are the practical aspects and triggers of succession planning? What is the business worth and what impact will IRS have on your decision? How will 'unfunded liability' impact your transaction? Can a 3<sup>rd</sup> party help define your real value (not your accountant) and also find a buyer? How do you protect the discretion of your negotiations so key personnel/customers don't "jump ship" and dilute your value? After the sale, what emotions can you expect?

Tools Not Toys: A Look at  
Innovative Hardware for  
Service Contractors

ConTech Crew  
*Huntington Ballroom  
North*

The ConTech Crew is here to bring you the latest in technology hardware innovations impacting workflows for service contractors. The Crew will introduce and demonstrate hardware followed by a group discussion on ways to leverage these tools.





2:45 pm – 4:15 pm

## Education Session I

**Workshop 1**  
**The Scooch Project –**  
**Moving Your Leadership Just a Little**  
**Steve Thomas**  
**Salon A**



**Steve Thomas**, back by popular demand, remains MSCA's highest-rated conference speaker to-date. Steve will navigate the riddle of why some people, teams and cultures feel empty! Why is it that two leaders can do the exact same thing and get two completely different results? Why can two companies be the same in so many areas and yet one is fun to work for and the other drives people insane? Steve will explore one common thing that effective leaders have that enables them to accomplish great things, in and through people. Usually all it takes is for you to SCOOCH...move just a little!

Steve Thomas invests his life in helping a variety of organizations build leadership, develop people, and create teams. It is no secret that great people make great organizations. Convinced that leadership drives the workplace culture and the culture drives everything else, he challenges current thinking and belief systems to bring about change...and fun!



**Workshop 2**  
**Building Data Analytics: Strategic Advantage or Threat?**  
**Sunny Sandhu & Keith La Rose**  
**Salon B**

Many buildings have systems which are producing massive amounts of data each day. That data is often discarded and not used to its full potential to bring value to the building owners, operators and occupants. Explore how equipping your mechanical service offering with advanced building analytics software technology can add additional revenue streams to your business. These additional revenue streams include pull through service work uncovered by advanced analytics, as well as getting more out of your service technicians by using advanced analytics to perform data and performance driven maintenance versus the traditional time-based maintenance. Real-world case study examples will be showcased, highlighting project results and return on investment.

**Sunny Sandhu** is the Sales Application Engineer at CopperTree Analytics. With seven years of experience in building mechanical systems and automation systems, Sunny focuses on working with organizations to demonstrate the capabilities and value of CopperTree's advanced analytics software technology and showcase how it can be leveraged to increase energy efficiency, maximize occupant comfort, and optimize the operations of their facilities.

**Keith La Rose** is the Director of Business Development at CopperTree Analytics and has sixteen years of business development experience in software, scientific and environmental verticals, plus a background that includes environmental monitoring and renewable energy projects. Keith focuses on energy management software solutions for companies seeking to create operational efficiencies, reduce their buildings' energy consumption, and enhance their bottom lines.



# MONDAY, October 22

## Workshop 3

### Easy Prey: How to Protect your Business from Data Breach, Cybercrime and Employee Fraud

Nick Espinosa  
Salon C

Learn from an expert in security and network infrastructure on multiple platforms, how cyber security plays an increasingly important role for businesses today, especially for service contractors. With access to infrastructure and connected systems, contractors are frequently targeted by hackers for malicious reasons like cyber-ransom and systems penetration. In this session, **Nick Espinosa** will inform, and possibly disturb, with his important message regarding minimizing risks to your privacy, data, and business operations in our connected digital world, while still enjoying the benefits of technology.

An industry thought leader, Nick is sought after for his advice on the future of technology and how it will impact every day businesses and consumers. He has designed, built, and implemented multinational networks, encryption systems, and multi-tiered infrastructures as well as small business environments. He is passionate about emerging technology and enjoys creating, breaking, and fixing test environments.



# TUESDAY, October 23

6:30 am – 9:00 am  
Golf Bag Storage  
Shoreline

*For those playing in the MSCA/DEWALT tournament this afternoon, drop off your golf clubs by 9:00 am this morning and they will be ready and waiting for you on your golf cart when you arrive at the course.*

6:45 am – 7:30 am  
Breakfast  
Lighthouse Courtyard

7:00 am – 12:00 pm  
Information Desk  
Grand Foyer East

7:30 am – 8:45 am  
General Session: The Art of Being Brave  
Featuring Adrienne Haslet & 2018 Everyday Hero Winner  
Salon DEFG

This special session will begin with tribute to MSCA's 2018 community service project in conjunction with Convoy of Hope. This will be followed by a welcome from MCAA President, **Mike Brandt** (Smith & Oby Company Walton Hills, OH). Then, special guest **Adrienne Haslet** will share her story of inspiration and determination. Adrienne survived the unimaginable bombings at the 2013 Boston Marathon, where she lost her left leg below the knee. She quickly rose to meet her daily challenges head on with a unique perspective. Being a full time professional ballroom dancer at the peak of her career and former Fortune 500 corporate manager, she had to learn an entirely new meaning of the word "patience." Adrienne will show you how to gracefully give the middle finger to feeling powerless and offer you her unique process for confidently pivoting to face the future despite overwhelming and sometimes paralyzing forces. She will teach you to how to look unflinchingly at that which scares you to death and proceed anyway... step by step.

During this moving session, MSCA Chair **Jaimi Lomas**, will also share her own very personal and touching story about herself and her father and how one's life can become enriched by overcoming obstacles.

Adrienne, along with Jaimi Lomas, will also participate in the presentation of the fifth annual MSCA Everyday Hero Award. This award has become a highly-anticipated feature of the conference where one special person is recognized and celebrated for his or her selfless contributions to their community.





# TUESDAY, October 23

9:00 am – 11:30 am

## **“Feel Good – Do Great” Convoy of Hope Packing Party** Huntington Ballroom

All spouses are invited to participate in our popular and fun annual Packing Party for a very worthy cause. For the ninth year, we will partner with Convoy of Hope to pack thousands of hygiene kits, including towels, soap, tooth brush, tooth paste, deodorant and comb, for distribution around the world, as we groove to tunes played by a popular DJ. We hope you will lend a hand and have a great time with this “Feel Good – Do Great” charitable event.



8:45 am – 10:15 am

## Education Session II

### **Workshop 4**

#### **The Scooch Project – Moving Your Leadership Just a Little**

**Steve Thomas**

**Salon A**

*Repeat of Education Session I, Workshop 1*

### **Workshop 5**

#### **Be a Story Worth Telling – How an Online Engagement Strategy Earns More Pay for Less Work**

**Billy Marshall**

**Salon B**

During this session **Billy Marshall** will open your eyes to the value of a positive online strategy. Humans are programmed to respond to images, stories, and the rhythm and rhyme of music. We are stirred by our favorite songs, movies, and books. Historically, large consumer brands like Coca-Cola, Ford, and Chevy have used music and stories to a profound effect in establishing a premium market position. Lately, brands like Facebook, Snapchat, Amazon, and eBay have used online storytelling with pictures and customer reviews to build extraordinary value for their shareholders. So how does a commercial service contractor take advantage of these human tendencies toward images, music, and stories to similarly build the value of their service brand? Join this session to discover how technology makes it possible to pull the customer into an online experience that transforms your services brand into a great digital storyteller and earns you more pay for less work.

Billy Marshall is the CEO and founder of ServiceTrade and the author of The Digital Wrap, a book that helps service contractors understand how to build valuable relationships with their customers through online engagement. Prior to ServiceTrade, Billy served in executive leadership positions with service contracting companies, software ventures, and technology industry leaders Red Hat, IBM, and General Electric.



### **Workshop 6**

#### **Easy Prey: How to Protect your Business from Data Breach, Cybercrime and Employee Fraud**

**Nick Espinosa**

**Salon C**

*Repeat of Education Session I, Workshop 3*

10:30 am – 12:00 pm

## Education Session III

### **Workshop 7**

#### **Building Data Analytics: Strategic Advantage or Threat?**

**Sunny Sandhu and Keith La Rose**

**Salon A**

*Repeat of Education Session I, Workshop 2*

### **Workshop 8**

#### **Be a Story Worth Telling – How an Online Engagement Strategy Earns More Pay for Less Work**

**Billy Marshall**

**Salon B**

*Repeat of Education Session II, Workshop 5*

### **Workshop 9**

#### **Life Would be Easy if it Were Not for Other People**

**Connie Podesta**

**Salon C**

Imagine what you could accomplish if you could decode the mystery of human behavior and truly understand what makes people do what they do and say what they say (including yourself!). Research shows that the #1 key to SUCCESS is the ability to get along with other people at work and at home. With her amazing insights into ourselves and others, human relations expert **Connie Podesta** will take you right inside the minds and personalities of the people you deal with every day – bosses, colleagues, partners, customers, friends, and family—so you can act, rather than react, to whatever life throws your way. Get ready for less stress and more success!

Connie Podesta is a game-changing, revenue-building, sales-generating ball of fire whose rare blend of laugh-out-loud comedy, killer take-away strategies, and interactive, no-power-point delivery style have made her one of the most unique and memorable speakers on the stage today.





# TUESDAY, October 23

## OPTIONAL EVENTS

*Pre-registration is required for all optional programs.*

### **26th Annual MSCA and DEWALT Golf Tournament** **Pelican Hill Golf Club North** **Bus departures begin at 12:00 pm** **Shotgun Start at 1:00 pm**

A championship golf course, the prestigious Pelican Hill is perched upon the coastline, just south of Newport Beach. Deep ocean views to the horizon guide all 18 tee shots on the par 71 North Course, which opened in 1993. Open canyons and elevated plateaus with a palette of a hundred colors contrast the distinct green edges of the fairways and greens. This will be a 1:00 pm Shotgun start played with a scramble format. Prizes for winning teams and special competitions, sponsored by DEWALT. Box lunch included. Golf clubs dropped in the Shoreline room prior to 9:00 am will be ready and waiting on your golf carts upon arrival at the course.

**Continuous bus departures start at noon, leaving from the Conference Hall lobby entrance near Mariners Ballroom.**

### **Pick a Paddle – Newport Harbor and Back Bay Tour** **12:30 pm – 3:30 pm**

Enjoy paddling or kayaking the placid waters of Newport Harbor and Back Bay on this informative sightseeing tour along with a professional guide. The tour begins in Back Bay, a natural wetland and estuary that has incredible richness and diversity of wildlife, from microscopic plankton floating in its tidal waters to coyotes and bobcats that are seen on the bluffs. It's home to hundreds of migratory and non-migratory birds, making it a true birders paradise. You'll paddle through the mudflats to Newport Harbor, the largest recreation marina in the Western United States and circle Linda and Harbor Islands, two of the six man-made islands that dot the area, with some of the priciest real estate in the country. Across the channel you will see the former home of John Wayne and Nicolas Cage, and if possible some sea lions too. All equipment provided along with a box lunch.

**Bus departs the Conference Hall lobby entrance near Mariners Ballroom at 12:30 pm.**



### **Newport Back Bay Pontoon Getaway** **1:00 pm – 4:00 pm**

Participants will enjoy cruising in these modern, sleek, quiet, easy-to-drive boats. You will enjoy vistas of quaint Balboa and regal Lido Islands from a truly unique perspective. As you wind your way through the water, the day will come alive with the sights and sounds of the Newport Harbor. From the world-famous Balboa Pavilion to the islands, ferries, birds, sea lions, majestic yachts and waterfront real estate, it's truly a treat for the senses. Plentiful appetizers and wine are included. Dress comfortably and casually.

**Bus departs the Conference Hall lobby entrance near Mariners Ballroom at 1:00 pm.**

### **Behind the Scenes Tour of Angel Stadium's Mechanical Systems** **1:00 pm – 4:00 pm**

This unique tour will include a stadium overview including the box seats and stadium suites. You will then be treated to an exclusive tour of the stadium's mechanical systems including Turbocor chillers, air handlers and the control system. Box lunch included.

**Bus departs the Conference Hall lobby entrance near Mariners Ballroom at 1:00 pm.**



# WEDNESDAY, October 24

**7:00 am – 8:00 am**

### **6th Annual MSCA/LAARS –** **A Bradford White Company Sun Run** **Beach Across the Hyatt Bridge**

Join us on the beach for the 6<sup>th</sup> annual 5K Sun Run (or 2-mile walk) along the Huntington Beach boardwalk. Enjoy the morning sun and ocean view as you race to the finish line. Conference attendees and spouses are welcome to attend. Participants will be timed, and the winners will be recognized. There will be water stations and finish line refreshments. This is a great way to get your energy revved up for the last day of MSCA18.



# WEDNESDAY, October 24

7:00 am – 3:00 pm  
Information Desk  
Grand Foyer East

7:45 am – 8:45 am  
Breakfast  
Lighthouse Courtyard

9:00 am – 10:15 am

## Peer Group Forums II

What’s In It for You?  
The Value of MSCA  
Involvement

Mark Crockett  
Chris Carter  
Driftwood

As a member of MSCA, you belong to the premiere organization for heating, cooling, plumbing and refrigeration service contractors. You have available to you a wealth of resources and programs that can help grow your business and outshine your competition. But have you ever considered how much more value you could gain by becoming actively involved in the organization? Join several MSCA leaders to hear how their involvement with MSCA has played a major role in enhancing their own professional development and inspired many new innovative ideas and practices that they have been able to implement within their own companies. Learn what opportunities there are for involvement and why you need to take this next step.

Growing and Retaining  
a Skilled Workforce

David Geith  
Seacliff

Statistics show that growth in the HVACR industry will increase 21% by the year 2020; and that in the next 4-6 years another 22% of our industry workforce will retire and need to be replaced. That means that we need to be prepared to increase our current workforce 43% by the year 2020. In consideration of the previous thought process it is imperative that we hold onto our best workers, better train those that are in need, and seek to invest in the next generation of HVAC Service Technicians.

Using Your Story to  
Transform Your Service  
Brand

Billy Marshall  
Mike Rosone  
Shoreline

A picture is worth a thousand words! In this session you will learn, collaborate and share best practices with your fellow MSCA contractors on creating a more meaningful customer experience through video/picture documentation. Humans are programmed to be impressed by and learn from images and stories. See how some of the industry’s most creative thought leaders are using video to increase sales, explain issues and engage customers in a more meaningful way.

Dealing with the New  
Realities

Drew Harrison  
Fountain East

Uber for Service Techs. Chillers with hidden cellular modems. Control systems that program themselves. Universal remote controls for buildings that don’t need a password into the legacy system. The internet is affecting every industry. How is it going to affect HVAC and what are we going to do to prepare for the change instead of getting passed by? Come to this forum to hear about new technologies that are headed our way and what you can do to take advantage and best position your company for the future ahead.

Get Outside the Box:  
Expanding Into New  
Markets

Mike Hupp  
Fountain West

Are you trying to figure out how to get your company out of the box and expand into other markets? There are many benefits to being a One Stop Shop for you as a business and for your customers. During this session you will hear how other successful contractors have been able to expand into new markets, such as residential HVAC, residential plumbing, food services, energy services, controls and more. We will share best practices on tactical ways that you can become the contractor that does it all!

Local Oversight  
Committees:  
Goals and Purpose

Russ Borst  
Anthony Gallagher  
Huntington Ballroom  
South

Join two leading members of the Joint UA/MSCA Labor Committee to hear how establishing a local Oversight Committee under the National Service and Maintenance Agreement can help foster local communications, grow your service base, enhance training opportunities and develop an area-wide recruiting plan.

Plunging into  
Plumbing Service

John Geiling  
Adam Wallenstein  
Sunrise

Join us in an exciting discussion about how to start and grow your plumbing service business. This open forum will include topics such as how to get started in the business, how to recruit and retain the best techs, plumbing business offerings, technology and plumbing service and how to utilize the National Service and Maintenance Agreement in your plumbing business.

Don’t Lose That  
Customer: Maintaining  
Customer Loyalty

Renee Fiorelli  
Sean Hamilton  
Sunrise Foyer

In this session, be prepared to share and learn new strategies that companies are using to help retain customers in this highly competitive business. How are the best and brightest companies earning their customer’s loyalty? We will discuss providing added value, listening to the customer’s needs, coaching internally and more. There will be many tips to take away and use in your own organization with your customer base.

Save Time and Increase Your  
Bottom Line with Software  
Innovations for Service

ConTech Crew  
Huntington Ballroom  
North

Join the ConTech Crew for a look at innovative software solutions that can make your service business more efficient and more effective. The Crew will introduce and demonstrate software followed by a group discussion on ways to leverage these tools.



# WEDNESDAY, October 24

10:30 am – 12:00 pm

## Educational Session IV

### Workshop 10

#### Stories of Success: Addressing the Labor Shortage

Tim Herbert & Josh Windy

Salon A

It is no secret that we are headed towards a crucial labor shortage in the building trades industry. In fact, it is already apparent in many parts of the country. During this session **Tim Herbert** (Washington State Pipe Trades) and **Josh Windy** (Michigan Pipe Trades) will teach you how the service technician labor shortage is being creatively and successfully addressed by two forward-thinking organizers. They will discuss the steps they undertake to find and contact potential recruits; how long-term, on-going relationships are fostered; how an interactive database has been created to help track and maintain contacts; and how local contractors are involved and engaged in the process. They will share their secrets to success and get you thinking differently about recruiting plans for your area.

### Workshop 11

#### Designing Your Business for the 21st Century

Mike Walsh

Salon B

Most companies are simply not designed to survive. They become successful on the basis of one big idea or breakthrough product. The companies that will thrive in the near future are the ones not only embracing change but breaking the rules. Companies built to survive are a result of deliberate business design decisions smart leaders are making today. This session will outline the mega-trends shaping the future of business and consumer behavior, and the lessons learned from successful Fortune 500 companies on leveraging disruptive innovation, adopting a data-driven mindset and leading change through digital transformation. Walsh will provide additional take home value by providing “Mind Grenades” – thought-provoking questions, “next action” ideas and concrete suggestions specific for the HVACR industry.

**Mike Walsh** is the CEO of Tomorrow, a global consultancy on designing companies for the 21st century and advises leaders on how to thrive in the current era of disruptive technological change. Mike’s bestselling books include ‘Futuretainment’ and ‘The Dictionary of Dangerous Ideas’. Mike has been a pioneer in the digital space since the 1990s, running both successful start-up ventures as well as holding senior leadership positions in established media organizations.



### Workshop 12

#### Creating a Vision of Greatness

Paul Saginaw

Salon C

Paul, who admittedly calls himself, “just a guy who cuts corned beef sandwiches,” will share his inspirational and “visioning” approach to business that has led to Zingerman’s success, including the unique business practices that Zingerman’s has implemented and adapted to create a Community of Businesses. Paul will explain why Great Service, Open Book Management, and Visioning have created a culture of engagement and appreciation from the front line to the organization’s governing body with behind-the-scenes “secrets” that are invaluable in building a special, sustainable business of any kind. Zingerman’s “signature approach” of creating an extraordinary organization and becoming the best at what they do – not necessarily the most profitable – and building a good reputation and brand, is what results in long-term success.

**Paul Saginaw**, restaurateur and visionary, and Ari Weinzwieg joined forces in 1982 to found Zingerman’s Delicatessen, a small 25-seat deli in Ann Arbor, Michigan. All they wanted at that time was a great corned beef sandwich and an organization with soul. Zingerman’s started as 1300 square feet of combined restaurant and specialty food retail space, run solely by Paul, Ari and two employees. The Zingerman’s Community of Businesses now has 22 partners, employs over 750 people and generates over \$65 million in annual sales from ten separate businesses. Paul believes that he has been successful in spite of the fact that he has limited natural talent and abilities because he has always thought that the only real limits are those of vision.



12:00 pm – 12:45 pm

Lunch

Lighthouse Courtyard





# WEDNESDAY, October 24

1:00 pm – 2:30 pm

## Education Session V

### Workshop 13

#### Are Your PM Sales Doing the Heavy Lifting?

**Dave Bavisotto, Chris Carter, & Wayne Turchetta**  
Salon A

During this session three very successful and experienced mechanical service contractors will discuss why maintenance contracts are the foundation of your business and the quickest way to grow your profits! Is your company achieving its true growth potential? Learn the real value of selling agreements to accelerate your growth. These industry experts will explain the importance of growing your agreement base and keys to retaining it. Did you know that each new PM agreement has the potential to generate over 200% return on investment through repair work with proper retention?



### Workshop 14

#### Designing Your Business for the 21st Century

**Mike Walsh**

Salon B

*Repeat of Education Session IV, Workshop 11*

### Workshop 15

#### Creating a Vision of Greatness

**Paul Saginaw**

Salon C

*Repeat of Education Session IV, Workshop 12*



2:30 pm – 3:45 pm

### Closing Celebration

**Featuring UA General Secretary Treasurer Pat Kellett, Peter Diamandis, & Changing of the Guard**  
Salon DEFG

Join MSCA Board of Managers Chair **Jaimi Lomas** as she kicks off this closing session program. Special guest **Pat Kellett**, UA General Secretary-Treasurer, will update attendees on new UA initiatives and plans for the future. The program will then continue with a special presentation from **Dr. Peter Diamandis**, scientist, innovator, CEO, and founder of the X-PRIZE Foundation, which leads the world in creating large incentive prizes to drive radical breakthroughs. In this eye-opening and sometimes shocking presentation, Dr. Diamandis will reveal that the only constant is change, and that the rate of change is accelerating so fast that 40% of today's Fortune 500 companies are predicted to disappear in the next 10 years. You will learn how technology breakthroughs are transforming the industry to achieve new levels of success and making the world a better place to live and work. Dr. Diamandis will provide a true understanding of the immediacy of today's disruptions and impact on your company.

Jaimi Lomas will conclude the program by introducing incoming MSCA Chair, **Kip Bagley** (EMCOR Service Mesa Energy Systems, Irvine, CA), along with new MSCA officers and recognize outgoing board members.



7:00 pm – 10:00 pm

### Sky High Celebration featuring the MILWAUKEE TOOL Shed Band

Grand Ballroom

Get ready for a party in the sky like you've never experienced before, as you end your exciting, educational and hopefully insightful three days of the MSCA18 conference! Dance to the tunes of the **MILWAUKEE TOOL Shed Band**, comprised of 14 talented musicians and singers who also happen to work for—or are married to employees of—MILWAUKEE TOOL! Sky High Celebration will also feature dual flight combat simulators, aviation photo booth, airbrush tattoo artist and plenty of fun, food and beverages!



# SEE YOU NEXT YEAR IN COLORADO SPRINGS!

October 13-16, 2019  
The Broadmoor  
Colorado Springs, CO



Mechanical Service Contractors of America  
1385 Piccard Drive | Rockville, MD 20850  
P: (301) 869-5800  
[www.msca.org](http://www.msca.org)