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August/September 2001

## From Ordinary to Extraordinary "Contractor Advisory Board Steers EAI to the Next Level"



### Seven Principles of Excellence

**Networking**

- EAI Excellence Managers Meeting - May - Cincinnati, OH
- EAI Excellence Leaders Meeting - November - Bi-coastal
- MemberNet/MentorNet

**Training and Education**

- Classroom/WebCast
- Computer-Based Training
- On-Line Training
- Member Resource Library

**Sales & Marketing**

- ServiceNet
- Seal of Excellence Program
- Member Resource Library

**Strategic/Purchasing Allies**

- Manufacturer
- Distributor
- Automotive
- Services

**Operations**

- Benchmarking/Consulting

**Human Resources**

- National Recruitment
- Member Resource Library

**Industry Advancement**

- Scholarship Contribution •

By Eric J. Kuns, Executive Vice President and Chief Operating Officer

On August 3rd and 4th in Cincinnati, Excellence Alliance held the first meeting of its new Contractor Advisory Board which will be the guiding body for taking the organization from Ordinary to Extraordinary. In many ways this meeting was a re-launch of an already extremely successful alliance of top contractors across the United States. The energy and excitement generated during this meeting will surely be the wave that the alliance will ride well into the future!

EAI management and staff participating with 26 top contractors and current EAI members met to discuss membership parameters, growth plans for the alliance along with the launch of new alliances to deliver a full mechanical solution to the marketplace. The majority of the advisory board meeting was utilized to detail the Seven Principles of Excellence and assess their impact on current and potential members. The challenge is to find new ways to serve the membership while improving programs and services already offered.

The Contractor Advisory Board will be the voice of the EAI members and will guide the future of the alliance in a fashion that truly benefits each organization in the membership. The re-introduction of the 7 Principles of Excellence outlines the commitment EAI has made to support all current and new members in the alliance.

The Contractor Advisory Board also established minimum participation standards with respect to the 7 Principles

of Excellence. All members will be rated periodically on their utilization of the 7 Principles of Excellence.

These principles, listed at left, form the basis for membership within the organization. These principles begin with networking amongst top contractors and comes full circle with industry advancement, EAI's way of giving back to the industry through scholarships.

To assist members in this process, EAI is placing a network of Excellence Managers in the field. Excellence Managers will implement and advance contractors through all of the EAI programs, products and services. These sales professionals will work with contractors, strategic allies, and national accounts to establish new relationships and enhance existing member participation. As of September 1st we will have three managers in place for the Cincinnati, Cleveland and Chicago districts.

EAI's goal is to change the marketplace - to establish new standards of performance with the best mechanical HVAC, plumbing, refrigeration and electrical contractors in America. This can only be accomplished with a core group of progressive contractors who are dedicated to providing the highest level of quality service to all of their customers. This objective will be realized by contractors who take full advantage of the 7 Principles of Excellence. Utilizing the 7 Principles cannot be optional. They are the reason EAI exists today. They are the vehicle for transforming EAI members from Ordinary to Extraordinary! •

## Contractor Advisory Board Members

### HVAC/RLC

- **Tim Cropp**  
Cropp-Metcalf AC & Heat
- **Read Frymire**  
Frymire Engineering Company
- **Ray Isaac**  
Isaac Heating and Air
- **Steve Miles**  
Jerry Kelly Heating and Air

### HVAC/CIM

- **Allen Krupar**  
Air-Temp Mechanical
- **Scott Templin**  
Temperature Service Company
- **Brian Kottcamp**  
Walton Company
- **Rocco Pace**  
Oliver Mechanical

### Plumbing/RLC

- **Peter Bonfe**  
Bonfe's Plumbing, Heating & Air Service, Inc.
- **Frank Campisi**  
Bruni & Campisi
- **Andy Rodenhiser**  
Rodenhiser Plumbing and Heating
- **Jere Zimmerman**  
Summer & Zims

### Plumbing/CIM

- **Tom Grote**  
Grote Enterprises
- **Tom Owens**  
McIntosh Service, Inc.
- **John Stewart**  
Mechanical Systems of Dayton
- **Don Richardson**  
Richardson's Plumbing

### Refrigeration/RLC

- **Rob deWit**  
Baete-Forsyth, Inc.
- **Rick Busby**  
Busby Heating and Air Conditioning
- **Joe Saltmar**  
Climatech, Inc.
- **Charlie Elliott**  
Elliott Heating and Cooling, Inc.

### Refrigeration/CIM

- **Todd Morgan SR.**  
Comprehensive Energy Services
- **Brian Hughes**  
Hughes Environmental Engineering
- **Pat Welty**  
Saint Cloud Refrigeration

### Electric/RLC

- **George Fahnestock**  
Fahnestock Heating and Air, Inc.

### Electric/CIM

- **Jim Gibb**  
Robert Gibb & Sons, Inc.

## Member Profile: Delcard Associates

**Location:** Wilmington, DE

**Employee Count:** 175

**Founded:** 1984

**Niche:** Full Service Mechanical Contractor

**Contact:** Rick Tremi



Delcard Associates, Inc. was founded October 30, 1984. The company started in a one-office facility. Their business plan for projected growth was to do a \$5 million dollar volume after five years; this goal was attained in three years. Today Delcard Associates performs over 30 million dollars of mechanical/service work annually.

Over the years Delcard Associates has grown and

progressed into a full service mechanical contractor. Their main headquarters houses a 20,000 sq. ft. fully automated sheet metal fabrication shop and a 5,000 sq. ft. pipe fabrication shop, plus five loading docks, conference/training rooms and 5,000 sq. ft. of office space. Delcard's work and management team has been recognized and awarded both locally and nationally for quality, professionalism and safety.

The industry has been good to Delcard Associates and they are feeling a boom. Like many contractors across the country one of the hardest things for them is lack of qualified manpower. As we know at EAI, to keep up with the industry growth you need good dependable people. Rick Tremi said, "The construction industry needs to target our younger population while they are still undecided about what they want to do in the future. We, as well as schoolteachers and counselors need to promote construction as a viable career. The construction industry has not done an adequate job of promoting itself. The Excellence Alliance Foundation appears to be part of the solution to this continuing issue."

Delcard Associates became an EAI member in December 2000. Although a relatively new member, they have great plans for implementing their EAI membership. Heather Cameron, VP/Corporate Secretary says, "We expect a considerable improvement, in using EAI to our advantage, in the next six months." They have charged their VP/Purchasing & Estimating Manager, Larry Shub, with the daunting task of maximizing this resource. Good luck Larry, there are lots of great agreements to take advantage of!

Delcard Associates values the opportunities EAI can provide. Networking and the strategic partnerships are very important to them. They plan to attend their first Excellence Leaders meeting this fall in San Diego.

Delcard Associates is considered the Wilmington market's #1 Mechanical Contractor, known for professionalism, quality and safe construction practices. Their success is proof that hard work and striving towards established goals really does pay off. •

## COMFORTECH 2001 NASHVILLE CONVENTION CENTER SEPTEMBER 5-8, 2001

Register early to take advantage of the Early Bird/EAI Group rate special of \$360.00.

Register through EAI and receive a discounted rate.

EAI members may use their allowances, please indicate on your registration form if you will be taking advantage of this option.

EAI will take care of all of the details and insure that your company's registration is quick and easy.

Register today and avoid the rush.

Call Excellence Alliance, Inc. at (877) 463-2392 for a registration form.

## Training Schedule

### Excellence Development Series:

#### Quality

##### Principles of Excellence

Instructor - Mike Callahan

Sept 13-14, 2001	Cincinnati, OH
Oct 11-12, 2001	Cincinnati, OH
Nov 15-16, 2001	Cincinnati, OH
Dec 13-14, 2001	Cincinnati, OH

##### Problem Solving/Teambuilding

Instructor - Al Roach

Oct 8-9, 2001	Cincinnati, OH
Feb 4-5, 2002	Denver, CO

##### Leadership

Instructor - Jim Norris

Sept 17-18, 2001	Cincinnati, OH
Oct 15-16, 2001	Cincinnati, OH

#### Operations

##### Internet Success

Instructor - Brian Urbanski

Sept 19-20, 2001	Cincinnati, OH
Oct 17-18, 2001	Cincinnati, OH
Nov 19-20, 2001	Cincinnati, OH

##### Dispatch Management

Instructor - Jeff Somers

Dec 10-11, 2001	Cincinnati, OH
Jan 14-15, 2002	Denver, CO

##### Financial Management

Instructor - Lyn Soo Hoo

Nov 13-14, 2001	Cincinnati, OH
Dec 10-11, 2001	Denver, CO

##### Business Valuation

Instructor - Al Roach

Nov 5-6, 2001	Cincinnati, OH
Jan 28-29, 2002	Denver, CO

#### Sales/Marketing

##### Commercial Service Sales

Instructor - James Graening

Sept 24-28, 2001	Cincinnati, OH
Dec 3-7, 2001	Cincinnati, OH

##### Commercial Service Sales - Advanced

Instructor - James Graening

Oct 1-2, 2001	Cincinnati, OH
Nov 27-28, 2001	Cincinnati, OH

##### Performance Contracting

Instructor - Eric Kuns

Oct 3-4, 2001	Cincinnati, OH
Nov 29-30, 2001	Cincinnati, OH

##### Design/Build Contracting

Instructor - Glin Jay

Nov. 1-2, 2001	Cincinnati, OH
Jan 24-25, 2002	Denver, CO

##### Sales Management

Instructor - Drew Cameron

Oct 22-23, 2001	Cincinnati, OH
Dec 17-18, 2001	Cincinnati, OH

##### Marketing Management

Instructor - Drew Cameron

Oct 24-25, 2001	Cincinnati, OH
Dec 19-20, 2001	Cincinnati, OH

##### Residential Sales

Instructor - Drew Cameron

Oct 29-30, 2001	Cincinnati, OH
Jan 7-8, 2002	Denver, CO

Note: Two permanent state-of-the-art training facilities are being established in Denver and Cincinnati. Through these facilities we will deliver higher quality training in a more controlled environment allowing the use of better technology and business management.



## EAI Cincinnati Becomes a NATE Testing Organization

Excellence Alliance, in cooperation with North American Technician Excellence (NATE), is pleased to announce it will begin offering testing for the core and specialty tests from its Cincinnati location.

What is NATE?

The NATE program focuses on certification and is designed to strengthen existing training and education programs instead of competing with them. NATE works with you to set knowledge standards.

Besides getting your program in front of potential students, NATE certification can help validate your training/education. Just compare aggregate data on your students to the national average and you'll know if your programs help technicians better prepare to meet the industry's highest standards!

NATE certification is designed for Installation and Service technicians who work on residential and light commercial equipment and systems: Air Conditioning, Air Distribution, Gas Heating, Heat Pumps, and Oil Heating.

What is a NATE Testing Organization?

One of NATE's goals is to make exams as accessible as possible for the technician. NATE has established two types of testing organizations, Regular and Educational. Educational testing organizations offer testing as part of their training and have met strict guidelines by offering students NATE education and preparation within their training programs. A regular testing organization offers regularly scheduled or on-demand testing session dates and locations. Excellence Alliance is an authorized Regular Testing Organization.

Excellence Alliance Inc. dates for 2001 NATE test offerings are:

- September 10, 2001 - Core Testing
- November 12, 2001 - Specialty Testing

Please visit the NATE site ([www.natex.org](http://www.natex.org)) for further information on preparing for your desired test. In addition, visit the EAI web site ([www.eainet.net](http://www.eainet.net)) and download the NATE Test Registration Form. Complete the form and fax to 859-334-6601 to the attention of the Education division for processing. •

## Calendar of Events

### Networking

#### ComfortTech Conference

Sept 4-8, 2001 Nashville, TN

#### EAI Excellence Leader Meeting

Nov 8-10, 2001 San Diego, CA

#### ACCA Conference

Feb 27-Mar 2, 2002 Kissimmee-St. Cloud, FL

#### EAI Excellence Manager's Meeting

May 16-18, 2002 Cincinnati, OH

### Orientation

#### Member Orientation: On-site Classroom (Follows Principles of Excellence Offerings)

Sept 15, 2001	Cincinnati, OH
Oct 13, 2001	Cincinnati, OH
Nov 17, 2001	Cincinnati, OH
Dec 15, 2001	Cincinnati, OH
Jan 19, 2002	Cincinnati, OH
Feb 16, 2002	Cincinnati, OH

#### Member Orientation: On-line Interactive

Sept 4, 2001	11am EDT
Oct 2, 2001	11am EDT
Nov 6, 2001	11am EST
Dec 4, 2001	11am EST



## EAI's New State-of-the-Art Training Facility

Excellence Alliance Inc. will hold its first training event in its new state-of-the-art training facility September 13-14, 2001, with the presentation of Quality - "Principles of Excellence" class.

Located just seconds from the Cincinnati/Northern Kentucky International Airport, the high-tech facility will accommodate up to 30 students. It includes a multimedia presentation system, high-speed internet connections for access by students using laptops, individual workspaces, a communications area for the processing and receipt of faxes, telephones to maintain contact with your business or customers, and a breakout area for discussion of training topics or networking with other students.

Each student station includes an omni-directional microphone to clearly capture and process comments and promote interactivity between the students and their instructor.

Planned activities include live (web cast) presentations to be used during instructor-led courses or corporate information sessions, recording of presentations to storage servers that act as an archive for future member use, tele and video conferencing capability. EAI looks forward to opening this facility and having our members take advantage of the various training events offered.

Please contact Tim Wiley @ 1-877-439-4677 for more information about this session and our complete offering. •



## The Unico System®

## EAI and Unico Form Partnership

We are pleased to announce that Excellence Alliance, Inc. and Unico, Inc. have entered into an agreement that will provide special incentives for EAI members to purchase and install Unico's products.

Unico has patented a small duct system that outperforms conventional heating and cooling systems. The Unico System works on the principle of aspiration, which eliminates hot and cold spots, providing even temperatures from floor to ceiling. The air handler and supply tubes are specifically designed to dampen noise and vibration, which enables them to deliver quiet comfort.

The Unico System is excellent for retrofits and high-end custom homes because it can be installed where other systems cannot. Their flexible mini-ducts can be routed through existing cavities in ceilings, walls, and floors eliminating the need for extensive remodeling. The modular air handlers and coils can easily be installed into ceilings, crawlspaces, and closets.

Excellence Alliances' agreement with Unico will provide the following quarterly allowances to EAI members:

- A 4% allowance on all purchases, plus
- 1% on incremental purchases of 25%
- 2% on incremental purchases of 50%
- 3% on incremental purchases of 75%
- 4% on incremental purchases of 100%

EAI members may also participate in Unico's co-op advertising program. For marketing programs approved by their distributors, EAI members may earn up to 1% of the previous years purchases as a credit toward advertising. Their marketing department is available to assist your promotion of this innovative product to your market.

Excellence Alliance and Unico are excited about the potential new business opportunities their products will create for EAI members. To find out more, please call Shannon Intagliata at 800-527-0896, email him at [shannon@unicosystem.com](mailto:shannon@unicosystem.com) or check out their web site at [www.unicosystem.com](http://www.unicosystem.com). •

## Every Cent Counts - Excellence Alliance Group Employees Sponsor Two Scholarships

The EAG employees, located at the corporate headquarters in Hebron, Kentucky, have creatively developed a plan to fund two scholarships through the Excellence Alliance Foundation.

One of the scholarships will be supported by volunteer employee payroll deductions for as little as \$2.25 a week and will be accompanied by matching dollars from Excellence Alliance Inc. The award will be granted in about six months.

The second scholarship will be composed of money that is collected from the newly installed soft drink and snack machines. Items are sold for the nominal fee of 25 cents, so it is not only a bargain; it is a worthy cause. (Any excess weight gain will be the responsibility of the EAG employee.) These machines are located directly outside the new state-of-the-art training facility, so if you come for training bring some quarters and help build the fund.

"The impact of creating a scholarship fund by only collecting a quarter at a time illustrates that every donation, no matter how small, really does matter," Excellence Manager, John Durham stated as he contributed to the fund.

Due to the corporate headquarters new location in Kentucky and the close proximity to Ohio the plan is to choose a school from each state. Based on established EAF criteria, the EAG employees will select the schools to receive the scholarships. •

## Did You Know....

It's not too late to win a Winston Cup Race Event Package or a \$100.00 Racing Merchandise Gift Certificate! As a byproduct of there renewed emphasis on National Accounts, Pameco has teamed up with Honeywell on an exciting NASCAR promotion that is being exclusively offered to their National Account customers.

It's easy to win. You earn points by purchasing qualifying Honeywell products from Pameco. The qualifying products are items you are buying everyday - humidifiers, air cleaners, and residential and commercial digital stats.

By earning 400 points, you will win the Winston Cup Race Event Package consisting of:

- A ticket to the Winston Cup event of your choice
- A Honeywell Racing Crew Shirt
- A Honeywell Racing Hat

By earning 150 points, you will win a \$100 Racing Merchandise Gift Certificate for coats, jackets, shirts, hats.

Use the awards as employee incentives or use them yourself. You have until December 31, 2001 to accumulate your points. The earlier you win, the more race locations you will have to chose from. Call Judy Venezia-Gagliardi at (610) 530-3158 for further details. •



## Excellence Alliance ServiceNet Partners with PharMor to Provide National HVAC Service

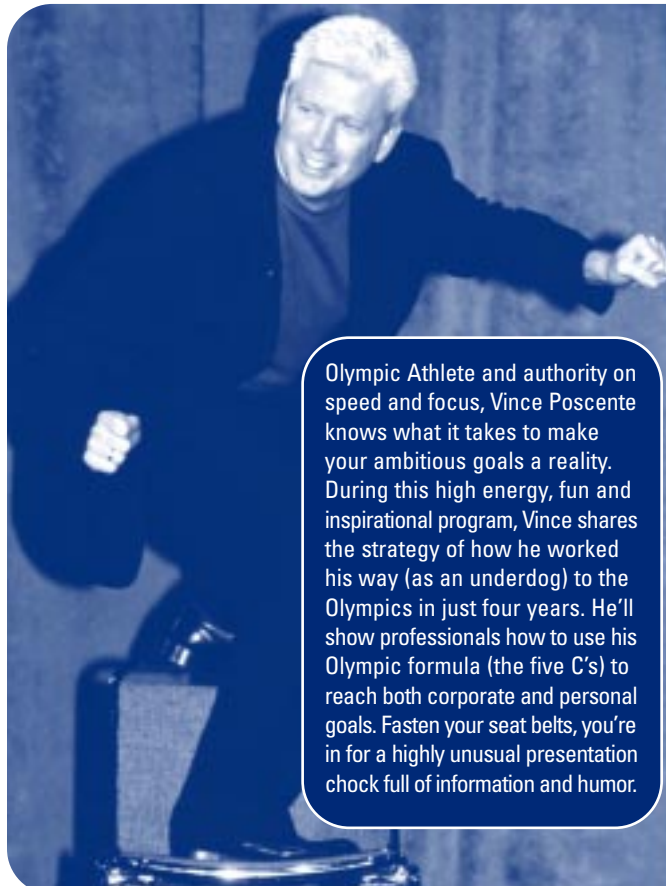
PharMor is a retail drugstore chain operating 140 stores under the names "PharMor", "Pharmhouse" and "The Rx Place" in 24 states with annual revenues of approximately \$1.4 billion. PharMor aggressively accomplishes its mission of offering customers a broad product mix and low prices. PharMor's motto is "Don't Pay Drugstore Prices!"

The company has recently incorporated the "Super PharMor" concept in many of its stores offering food products in a warehouse atmosphere without the warehouse club fees. Super PharMor stores challenge the food stores and the supermarkets for prices in every location. PharMor is aggressively pursuing new technology initiatives like the Internet to position itself as a leading retail chain in the new century. As one of the top Online Pharmacies on the worldwide web, PharMor has taken its expertise and pricing message to thousands of new customers with a fully stocked online drugstore and pharmacy. Customers can visit their online drugstore at [www.pharmor.com](http://www.pharmor.com) to shop 24 hours a day, 7 days a week.

"We will provide PharMor with timely, customized reporting on the service activity at their locations," said John Durham, EAS Excellence Manager. "Our dispatching software will allow Excellence Alliance to receive, dispatch, track and report call status to our members as well as to PharMor. It allows our staff to communicate and share information in a more

timely and efficient manner."

Excellence Alliance ServiceNet (EAS), a subsidiary of EAG, is a web-based service that connects businesses and consumers with its contractor network and guarantees their contractors' performance. EAS will dispatch providers, track jobs from dispatch through completion, and maintain historical data on PharMor calls through EAS's customer service call center. •



Olympic Athlete and authority on speed and focus, Vince Poscente knows what it takes to make your ambitious goals a reality. During this high energy, fun and inspirational program, Vince shares the strategy of how he worked his way (as an underdog) to the Olympics in just four years. He'll show professionals how to use his Olympic formula (the five C's) to reach both corporate and personal goals. Fasten your seat belts, you're in for a highly unusual presentation chock full of information and humor.

## Vince Poscente to Be Keynote Speaker

The November Excellence Leader Meeting will be held at the Hotel Del Coronado, on the island of Coronado, located across the bay from San Diego, CA. The meeting will officially begin on Thursday, November 8th at 12pm with lunch and opening session including key note speaker Vince Poscente and conclude on Friday, November 9th following the dinner banquet. However, you will want to stick around for the all fun, no work day - Saturday, November 10th. On Saturday, EAI will have organized San Diego area outings, a deep sea fishing trip and the greatly anticipated golf outing at a brand new, high tech, beautiful course in Chula Vista, about 20 miles south of San Diego.

The meeting will include training sessions led by industry experts, a strategic and purchasing allies tradeshow and many networking opportunities.

Benefit from a wealth of resources, meet important contacts and take home valuable information.

Watch the mail for the registration and a detailed brochure in the next few weeks!

If you would like to make your reservations now you may call the hotel directly at 1-800-HOTEL-DEL, be sure to identify yourself as part of the EAI group, we have pre-negotiated rates for you. •

## Excellence Alliance Staff Members and Office Locations

**Excellence Alliance Inc.**  
Cincinnati International Airport  
2365 Progress Drive, Hebron, KY 41048  
1-877-463-2392 Fax: (859) 334-6601

<b>Donald Schmitt</b> (859) 334-6612	Chairman/Finance dons@eaginc.net
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<b>Eric Kuns</b> (859) 334-6620	Executive Vice President/COO erick@eaginc.net
<b>David Schulte</b> (859) 334-6640	Vice President - Member Relations davids@eaginc.net
<b>Matt Fuhr</b> (859) 334-6610	Vice President - Finance mattf@eaginc.net
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<b>Tim Wiley</b> (859) 334-6622	Training & Education Manager timw@eaginc.net
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Quest for Excellence is a publication by Excellence Alliance, Inc., a membership organization of independent residential and commercial mechanical contractors. If you have a story or information that you think should be included, please email it to: [shilohe@eaginc.net](mailto:shilohe@eaginc.net). To send requests for duplicates or to be removed from our mailing list, please email your request to: [shilohe@eaginc.net](mailto:shilohe@eaginc.net).