THE RULES HAVE CHANGED:
Opportunities for our industry in a changed world

PARTNERS IN PROGRESS 18 mar 2010
Today's Conversation

- Where have we been?
- 2008 Futures Study: “did we nail it?”
- Opportunities in an Industry “gone wild”
- Management Challenges: “the rest of the story”
What a Trip!

40 years ago: Woodstock, Earth Day, Vietnam, hand take-off, tin bending, $4.22

Today: Obama, Climate Change, Iraq, Computerization, Automation, $57.08

Battles Fought: Safety, Training, Technology, Project Mgmt, Systems Integration
What a Trip!

FROM
Plumbing, Heating, Air Conditioning, Sheet Metal

TO
Mechanical & HVAC Contractors
What a Trip!

...the future requires new language
2008
New Horizons Future Study
Did we nail it?
Factors Driving the Future

SUSTAINABILITY  WORKFORCE

GLOBALIZATION  TECHNOLOGY
Factors Driving the Future

SUSTAINABILITY

GREEN LEED PRACTICES
DEMAND & PERCEPTION
ENERGY EFFICIENCY CODES & REGULATIONS
HVAC CONTRACTORS WILL BE LEADERS IN E/G/S
Factors Driving the Future

GLOBALIZATION

DELIVERY METHODS
OUTSOURCING
POWER & VENDOR GIANTS
GLOBAL SUPPLIERS
Factors Driving the Future

TECHNOLOGY

BIM/BIS (OPERATIONAL EFFICIENCIES)
PRE-FAB | MODULARIZATION
LEAN | WEB | INTELL BUILDINGS

MORE COMING
A Final Factor........

BUSINESS ENVIRONMENT

ENERGY NICHE | RETROFIT WHERE WORK W/B ROLL UPS / CONSOL
OPPORTUNITIES IN AN INDUSTRY

“GONE WILD”
Energy Efficiency

- It is “ours” to lose
- From unique offering to “arrow in quiver”
- Utility bills or carbon footprint?
Sustain/Green.... “CLEAN TECHNOLOGY”

- “Own position” of “Expert”
- Sustainability is Ubiquitous
- What is Clean Technology?
Integrated Delivery

- Alternate Delivery Widening
- Bundled Delivery
- Low Voltage Space...LEARN IT
- Cross-Trade cooperation needed
  (no longer divided and conquered)
Building Operation & Management

- Hierarchy of Services
  - mobile services
  - maintenance
  - remote monitoring
  - site engineering
  - full FM
  - workflow management
- High Performance / Smart Buildings
Technology

- Everything “WEB” Based
- Smart Buildings
- Sophisticated Platforms/Software
- Digital Archiving
- Smart Devices
- Global to Personal
Workforce + Knowledge Workers

- Knowledge Workers: Can we articulate our “hipness”?
- Demographics: They won’t look like us!
- Generation X, Y & Boomers
Workforce + Labor/Skilled Crafts

- Model Under Siege
  Trade Lines, Jurisdictions, Work Rules, Tiered Rates, OT, Benefits, Open Shop

- Acceleration of Younger Journeymen

- “Systems” Skills

- Feeding apprenticeship funnel in down times
Markets: My Niches

- FM, fight for the new “space”
- Owner Direct
- Real Estate Repositioning
- Energy Services
- Clean, Green, Lean......Clean Tech
- D/B, the new core competency
- “New” Industrials
MANAGEMENT/LABOR CHALLENGES

“The Rest of the Story”
Brands

- Intelligence (common thread in study)
- Brand Position drives opportunity
- Brand Value is $$$$ 
- “Union” vs “Skilled Crafts”
  ...........a new Brand!
Markets | Positioning

- Strategy originates with positioning
- Economic Clusters provide answers
- Vertical Markets: beware of messaging
- Labor/Management co-supportive
Workplace Supersedes Workforce

- Attracting & Retaining Talent
- Best Workplace?
- Internal Brand Building
- Is “The Union Hall” in need of a facelift?
- Energize Training Centers
POLITICS LIKE NEVER BEFORE
SO DAVID,
CAN I COUNT ON YOUR VOTE?
POLICTICS LIKE NEVER BEFORE

Our “Buddy” Obama? ....... Policies for us?

We Must Re-Engage
And Stay Together

In the “Re-Building America” Initiative
THANK YOU