

# 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!

TO

What?

*...the future requires new language*

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2008  
New Horizons Future Study

Did we nail it?

# Factors Driving the Future

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SUSTAINABILITY

WORKFORCE

GLOBALIZATION

TECHNOLOGY

# Factors Driving the Future

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SUSTAINABILITY

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



# Factors Driving the Future

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GLOBALIZATION

DELIVERY METHODS  
OUTSOURCING  
POWER & VENDOR GIANTS  
GLOBAL SUPPLIERS

# Factors Driving the Future

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WORKFORCE

CHANGING LOOK | IMAGE  
TRAINING & SKILLS  
SHORTAGES OF LABOR  
UNIONS | NICHE TRAINING

# Factors Driving the Future

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TECHNOLOGY

BIM/BIS (OPERATIONAL  
EFFICIENCIES)

PRE-FAB | MODULARIZATION

LEAN | WEB | INTELL BUILDINGS

MORE COMING

# A Final Factor.....

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BUSINESS ENVIRONMENT

ENERGY NICHE | RETROFIT  
WHERE WORK W/B  
ROLL UPS / CONSOL

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# OPPORTUNITIES IN AN INDUSTRY

"GONE WILD"

# Energy Efficiency

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- It is “ours” to lose
- From unique offering to “arrow in quiver”
- Utility bills or carbon footprint?



# Sustain/Green...." *CLEAN TECHNOLOGY*"

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- "Own position" of "Expert"
- Sustainability is Ubiquitous
- What is Clean Technology?



# Integrated Delivery

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



# Building Operation & Management

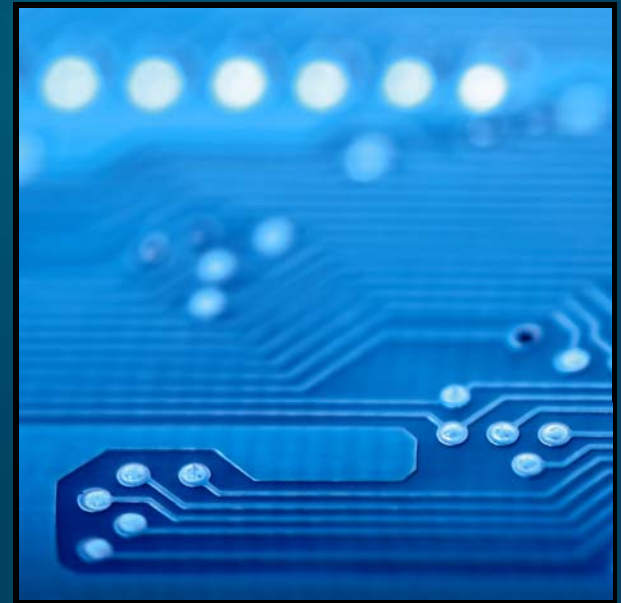
- Hierarchy of Services
  - mobile services
  - maintenance
  - remote monitoring
  - site engineering
  - full FM
  - workflow management
- High Performance / Smart Buildings



# Technology

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- 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



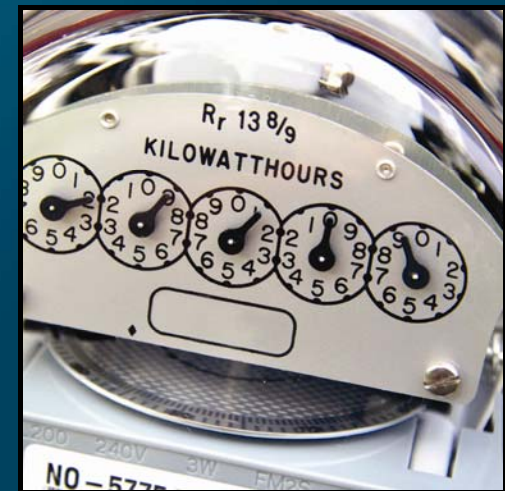
# Workforce + Labor/Skilled Crafts

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- 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



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# MANAGEMENT/LABOR CHALLENGES

“The Rest of the Story”

# Brands

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- 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

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# President Barack Obama



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SO DAVID,  
CAN I COUNT ON YOUR VOTE?

# Say What?



# POLICTICS LIKE NEVER BEFORE

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

*We Must Re-Engage  
And Stay Together*

*In the “Re-Building America” Initiative*

THANK YOU

