

PREVENTIVE MAINTENANCE SERVICE PROVIDER SURVEY

Please complete and return to:

ENGINEERING EXCELLENCE NATIONAL ACCOUNTS, LLC

10 Knollcrest Drive, Bldg. 300

Cincinnati, OH 45237

Attention: Contracts

Phone: (800) 540-6707

Fax: 1-877-246-5891

Email: contracts@engineeringexcellence.com

Company Name: _____

Address: _____ Website Address: _____

Phone: _____ Fax: _____ Email: _____

* If you do not have Email, would you be willing to obtain internet Email service in return for national account business to facilitate transfer of information? Yes No

Name of Company President: _____

Contact Person Regarding Quality Of Work Performed: _____ Title: _____

Contact Person Regarding Scheduling Of This Work: _____ Title _____

Contact Person For Service Repair/Replacement Quotations: _____ Title _____

Please list three (3) references from commercial clients in which you regularly perform roof top service work for in your area:

NAME AND ADDRESS	CONTACT NAME	PHONE
1)		
2)		
3)		

4) Does a national or regional consolidator own your company? Yes No If yes, National Regional
If yes, name: _____

5) What is your Tax I.D. Number? _____

6) Can you provide a Certificate of Insurance per requirements? Yes No

7) Can you provide proof of Workers' Compensation coverage? Yes No

8) Are you NEBB certified to do water balancing? Yes No

9) Are you NEBB certified to do air balancing? Yes No

10) How long have you been in business? _____ 11) How many Commercial HVAC service trucks do you operate? _____

12) Please describe geographical area served. List radius miles from each office including any branch offices: _____

13) Can you provide for (48) hour replacement of roof top units? Yes No Days to Install? _____

14) Do you offer design build services? Yes No Up to what size project? _____

15) Brands of DDC equipment you service: a) _____ b) _____
c) _____ d) _____
e) _____ f) _____

16) Can you offer Full Service Parts & Labor plus Preventive Maintenance contracts? Yes No

17) Do you use a filter changing company to change filters or do you change them yourself? Self No

18) Do you use a computer system to manage maintenance contracts, dispatch service, and issue Yes No
If yes, describe software and in-house management processes:

19) How many days in your billing cycle (on average) to invoice from date of service? _____

Engineering Excellence National Accounts, LLC acknowledges the confidential nature of this information and agrees to maintain strict confidentiality in all information provided.

20) Do you have any other miscellaneous service charges? Example truck charge or fuel surcharge.

21) At what distance would we incur a travel charge? _____ /miles Type of charge and amount? _____

22) What is your labor rate for commercial roof top service? \$ _____ /hr.

23) What is your labor rate for preferred maintenance customers for commercial roof top service? \$ _____ /hr

24) What is your parts mark-up for maintenance customers? _____ %

Is this negotiable? Yes No

25) Percent of total sales from commercial/industrial vs. residential? _____ %

26) Percent of total sales from service vs. installation? _____ %

Comments:

27) Briefly describe how you mobilize technicians when a new client is brought aboard?

28) Are your technicians uniformed? Yes No

COMPANY AWARDS/SIGNIFICANT ACCOMPLISHMENTS:

29) Are your technicians EPA certified? Yes No

30) Are you interested in our Audits Program? Yes No

The Audits program is an assessment of the various HVAC equipment at any given location, some are brand new location as well some occupied locations..

If so, who is your contact person for this type of work? _____

31) Do you have refrigeration technicians that can work on small refrigeration cases? Yes No

If so, how many technicians? _____

32) Are you a Union Company? Yes No