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## RHWHA NEWS

Published 3 times a year by the Residential Hot  
Water Heating Association of BC.

Contributors to this issue:  
Allan Seltzer and Leo Vaillancourt.  
Nelle Maxey, Editor.

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Questions and letters to the RHWHA office  
Phone/Fax BC Toll Free 1-866-414-0100 or  
604 414-0100  
email: rhwha@home.com

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Please send comments, questions, articles or  
industry information for the next edition of the  
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Next copy deadline: August 1, 2001

By mail:

6004 Lois Street,  
Powell River, BC V8A 4T7

By Fax:

1-866-414-0100 or  
604 414-0100

By email:

rhwha@home.com

# Boiler Replacement: The RIGHT Way

Boiler replacement jobs can be a scary thought for some contractors. Others look upon them not only as profitable, but also as a way to start a long lasting relationship with the client. The difference between the two contractors is the effort they take not only in listening to the client, but also in asking the right questions to make sure they will provide exactly what the client is expecting from the boiler replacement. This in itself will help you to make the profit necessary to operate your service company properly and ensure its financial stability. In this article I will endeavor to review the process and installation steps necessary to achieve both profit and a long term service client to build your business reputation on.

### *Do a Home and Heating System Audit*

The first thing to do when looking at a boiler replacement job is to check if the homeowners were comfortable. If they were not, just changing the boiler will probably not help in this area and you will have to do a little more investigating into the comfort issue to try to find out why they are not comfortable.

Offer the homeowners a choice of a good, better, best system. More often than not you will find that if the benefits are clearly outlined the owners will choose a better system. How often do you yourself choose a better product over the one with fewer features? Just check the options you purchased for your new car.

Perform a proper heat loss calculation on the house to check what boiler size is required. Often the existing boiler is oversized. Just replacing it with one the same size is no way to size it. The homeowner does not need a boiler that is either too large or in rare cases too small. It is also important to examine the heat distribution system to verify the systems ability to deliver the heat where it is needed. It makes no sense to install a 100mbh boiler in a house with only 60mbh worth of baseboard. Share this information with the homeowner so they understand the choice in boiler size and how adding extra baseboards to improve the comfort level of their home will effect the choice.

It is also a good idea to find out if the owners have any future plans for the house. Are they going to add on to the existing house or add anything to increase the boiler load requirements, such as a hot tub? Now would be a good time to offer the homeowner the option of adding an outdoor reset control by explaining the benefits in energy savings and comfort.

Have your salesperson/technician suggest an indirect fired water heater to replace their fuel fired water heater. Even if their existing tank is in good condition, now would be a good time to make the necessary changes to the piping so that when the heater needs to be replaced it can be done in a timely manner and with less disruption to the system.

### *Selection of Proper Materials and Parts a Must*

Once you have established the homeowner's needs, it is time to do a proper material estimate. The salesperson/technician must examine the heating system and, keeping in mind the types of boiler you will offer to the owner, make sure that all the necessary components are accounted for. Everything must be checked for compatibility. There may be other components that must be changed to upgrade the system. Don't forget the venting system, does it need repair or perhaps a liner. It is critical that every necessary component is accounted for, running back and forth to the wholesaler for fittings etc. during the installation will eat up your profits fast.

You should also remember to add the costs of the necessary permits and inspections. Point out to the homeowner that you have done so because it provides an element of protection for them. It is also the law so all contractors should be providing for this in their estimate.

This is where experience and technical training for your technicians is so valuable. Most manufacturers offer training sessions for their products. All of your salespeople/technicians should attend regularly to maintain their knowledge on current products and installation methods. If your sales and technical personnel are not the same person then you should make sure that the technicians attend the project to make the materials list so that it is as accurate as possible. Remember unscheduled trips to the supply house or discovering what the salesperson thought could be done can't or will cost much more than estimated will eat your profit up very quickly.

When you provide you client with the written quote don't be afraid to include all the literature provided by the manufacturers for their products. They spend a considerable amount time and money so you the contractor can have this material to help you sell the benefits of the products you wish to provide.

### ***Use a Job Checklist***

It is a good idea to develop a job checklist for evaluating the job as well as making sure that the parts list was accurate to help avoid any problems in the future. The checklist should also evaluate the job from start to completion and serve as a job inspection list when the project is complete. There are many samples of such lists available from different suppliers and organizations. (For example, see the RHWHA Design Manual).

Every job list should also include the following:

- 1) Type of Boiler, Model, and Serial Number, 2) Boiler Pump, 3) Number of zones,
- 4) Zones with valves or circulators, 5) Expansion Tank Model, 6) Indirect Water Heater, and 7) a complete checklist of components around the boiler.

### ***Plan for a Second Day at the Job Site.***

Now that you have checked your installation, it is time to do it again. The best way to do this second check is to plan your job to take two days, the first to get the system installed and fired up for immediate use. This will provide the owner with the chance to experience the heat and listen for any possible problems.

On the second day your technician can ask the owner for feedback and perform the final checks. Final checks should include combustion efficiency tests. Make sure the air has been purged from the system, check the boiler fittings and connections. Check all safety controls and thermostats are functioning properly.

You should include in the cost of your job the time it takes to clean the boiler area. The boiler room should be left neat and clean, all pipe shavings, pipe dope and so forth should be removed. This will show the homeowner that you take pride in your work, the job should be left in a way that you would be proud to leave your signature on it.

Callbacks usually involve some minor thing such as air in the system or a leak in one of the connections so a simple final check of this after the boiler has been operating for a day will usually eliminate a nuisance callback and thereby make the job more profitable.

### ***Instructions to the Homeowner***

Now that the installation is complete and you have performed all the final checks and cleaned up the boiler and your work area, you should take the time to walk the homeowner through the system. It is not necessary to make a heating technician out of the owner but rather just point out the major components and their operation. The homeowner should also be shown where all the safety switches and shutoffs are located, such as the electrical power, the water shut off, and the gas shut off valve. Also show the owner how these devices operate. Go through the warranty with the homeowner as well as the system checklist.

If you follow these tips you will not only have a more profitable installation, but you will show the homeowner a level of professionalism that will make them want to deal with you in the future.

— *Leo Vaillancourt, Plasco  
Manufacturing Ltd., Chairman  
RHWHA*