

How Forge Scaled High-Performance HVAC Sales with Conduit Tech



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Overview

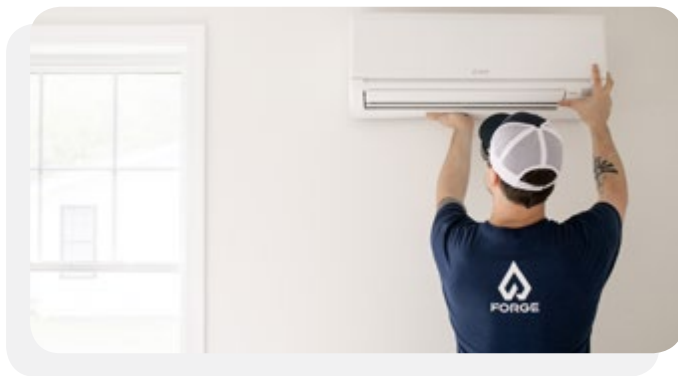
Forge is a modern skilled trades company focused on training and placing top talent in HVAC and other high-demand trades. When building out their HVAC offering, Forge has leaned into the importance of precision, efficiency, and customer trust. With Conduit Tech, they found a tool that could support both field performance and credibility with homeowners. The result has been better installs, stronger sales conversations, and improved operational alignment.

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The Challenge

At Forge the team understood that accurate equipment sizing would be foundational to delivering high-quality installations. Success in this market depends on trust, and trust is built on doing the job right the first time. Relying on rules of thumb or rough measurements wouldn't cut it. Incorrect sizing leads to performance issues, comfort com-

plaints, moisture problems, and costly callbacks. Investing in design was key to Forge's mission to deliver excellence from training to installation. What Forge needed was a way to ensure precision from the first homeowner visit through final installation. Their sales team needed tools that not only helped them calculate loads accurately, but also gave them the confidence and data to explain those decisions clearly to customers. They also needed to reduce friction in handoffs to design and install teams, where errors or unclear data could slow down jobs and introduce risk.



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The Solution

Forge integrated Conduit Tech into its sales and scoping workflow. Field reps began using Conduit to scan homes on site, assign rooms, and generate accurate load calculations using real-time data. This enabled them to make more informed recommendations and show customers exactly what their homes required.

With Conduit's 3D modeling capabilities, reps could create detailed visuals of the home during the scan. This helped make the sizing conversation much more tangible for homeowners. Instead of explaining

complex HVAC concepts in abstract terms, Forge's reps could point to a full rendering of the home and walk through room-by-room decisions. Customers understood what they were buying, why it was recommended, and how it would be installed.

The benefits went beyond in-home sales calls. Conduit enabled virtual walkthroughs and provided clean, structured data that made it easier for Forge's design and install teams to take over. This improved internal communication, reduced errors, and led to more seamless project execution.



"If you took Conduit away from me, I wouldn't feel nearly as confident. This tool gives you instant credibility with the homeowner and helps you size equipment the right way. There's no better way to do the job."

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Results



In the first year of adopting Conduit, **Forge has scanned over 200 homes and sold more than 100 HVAC systems.** The team has also seen improvements in internal efficiency, especially when it comes to design handoffs and permitting.

The upfront data provided by Conduit has led to fewer revisions on the backend, saving time and avoiding the delays that typically come from equipment mismatches or unclear specs. Sales reps have reported more confidence in their presentations, and customers are consistently more engaged in the process thanks to the 3D visualizations and transparent load calculations.

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Why It Works



Conduit Tech brought precision and clarity to Forge's HVAC sales process with detailed Manual J load calculations on site, the ability to quickly visualize airflow requirements and determine the right ductwork sizes, and then explain these choices to homeowners in simple, visual terms.

This created trust. When customers can see the data and understand the logic behind a recommendation, they feel more confident in the purchase. That trust extends to the entire project lifecycle, from equipment selection to final installation.

Internally, the use of Conduit created consistency across teams. Everyone from the sales to the in-

stall team was working from the same data, which helped ensure better outcomes and efficiency, helping deliver consistent results across dozens of homes and multiple crews at the same time.

Forge is committed to raising the standard in residential HVAC. That means doing the job right, educating homeowners, and ensuring every system is properly designed for the home it serves. Conduit Tech has become an essential part of how they deliver on that promise. From stronger sales conversations to better installs and smoother operations, the platform continues to be a critical tool for growth and trust. Forge is scaling smart, and Conduit is helping them lead the way.

Are you ready to transform your operations and take your business to the next level?

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