



Certificate



Ucora

Moving Decision-Making Closer to the Customer

In commercial HVAC service, the person closest to the problem is often the technician standing before the customer. Yet many organizations still require technicians to wait for approvals from someone sitting miles away before a solution can move forward. Ucora sees that gap as an opportunity. When technicians have the right information, pricing tools and authority, they can resolve issues faster while creating more value.

The idea changes the way commercial HVAC service businesses operate. Instead of treating technicians only as people who identify issues and complete repairs, Ucora helps position them as trusted advisors who can diagnose challenges, recommend solutions and provide quotations directly to customers. The result is a more responsive service experience without sacrificing management control.

The foundation was built more than 25 years ago. Paul Toth, Co-founder and Director at Ucora, recalls working with a commercial HVAC service company that enabled technicians to prepare field reports and quotations themselves. In one customer case, moving quotations directly from technicians to customers doubled revenue without increasing staff. The experience highlighted the idea that informed decisions can move closer to the customer when the right systems support the people making them.

Making Field Authority Work

The philosophy shaped GamePlanPro, Ucora's platform built specifically for commercial HVAC service companies. Toth identifies four conditions that make field decision-making effective.

1. Management must trust technicians.
2. Technicians need information symmetry, including customer, equipment, building and work-order histories alongside pricing details.
3. Automated pricing must enable accurate quotations without unnecessary office intervention.
4. Traceability must preserve accountability.

Information symmetry is central to the model. Commercial HVAC technicians handle complex equipment and difficult customer situations, but their ability to act is limited when critical context remains in the office. Access to historical information, work details and pricing guidance helps technicians make informed decisions without repeatedly seeking approval.

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Automated pricing allows the majority of quotations to move directly to customers while keeping management available for complex situations. Management becomes a resource rather than an automatic checkpoint. Traceability ensures greater authority does not come at the expense of control. GamePlanPro records status changes, pricing updates, notes, files, time entries and user activity, allowing companies to review what happened and why.

The same philosophy applies to dispatch. GamePlanPro supports traditional office scheduling, technician-controlled scheduling based on urgency, and shared work pools where qualified technicians can select jobs themselves. Greater flexibility can also help experienced technicians remain engaged with working schedules better tuned to their circumstances.

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Built for Commercial HVAC

Ucora began by building custom information systems before focusing primarily on commercial HVAC. Decades of customer-specific implementations shaped GamePlanPro's entity-based design, creating consistent interactions across work orders, equipment, buildings, contacts and contracts.

The commercial focus sets GamePlanPro apart from generic field service systems, residential-first platforms and construction project management software. Commercial HVAC service operations involve complex equipment histories, recurring service relationships, building-specific requirements and decisions that often need to be made while standing in front of the equipment. GamePlanPro was developed around those realities.

The company's custom software background continues to influence its approach. Analysts often work directly with technicians, gathering feedback and refining features around the way real HVAC service operates. These close relationships continue to give commercial HVAC businesses flexibility to adapt workflows beyond standard configurations when their operating models require it.

Ucora has also added AI as a supporting capability. The platform's AI tools can review customer policies and procedures for potentially missing information in a technician's work description, while the technician remains responsible for the final report or quotation.

GamePlanPro also supports career planning by helping managers assess whether assignments align with technician development goals. Greater autonomy, flexibility and meaningful development opportunities can support technician retention, an important consideration as commercial HVAC companies navigate workforce pressures.

Selected customer cases have demonstrated strong results, including significant productivity improvements and business growth. Ucora does not present those outcomes as automatic or universal. The potential value lies in helping commercial HVAC companies reduce unnecessary delays, improve customer responsiveness and give technicians the tools to act with greater confidence.

Ultimately, putting more decision-making in the field comes down to balancing autonomy with control. GamePlanPro gives commercial HVAC technicians the context and tools to act while providing management with visibility, pricing governance and traceability. The result is a platform designed specifically to help commercial HVAC service companies improve customer responsiveness, support technician retention and create a more efficient path from diagnosis to decision. This focused approach underpins Ucora's recognition as the Top Commercial HVAC Service Software in Canada 2026. [\[Link\]](#)



Paul Toth,
Co-founder and Director