

The background of the slide shows two hands raised in a gesture of support or training, with a tree in the background. The hands are positioned on the left and right sides of the frame, with fingers slightly spread. The background is a soft-focus outdoor scene with a green field in the foreground and a single tree in the middle ground under a bright, slightly overcast sky.

Super Techs: Training Mentoring

Disclaimer

- Some information may be proprietary and therefore questions about it may not be answered
- Some information we may chose not to comment on for other reasons



Hiring: A Recap

Hire Right

- The key to encouraging growth is hiring the right person to fill the spot.
 - Hire for personality and aptitude, train for performance.
 - Vocations that transfer easily may be:
 - Auto Mechanic
 - Security or audio tech
 - Electricians
 - Appliance Repair Techs
 - Handyman
 - Less obvious options may include:
 - Customer service positions such as restaurant or dept. store
 - Previous sales such as cars or real estate
 - Engineering background
 - Managers or Supervisors

Hire Right

- Hire the right person for the right job.
 - Use interviewing tools.
 - Personality profiles / Aptitude tests (Prevue, Brainbench, etc.)
 - Drug and background checks
 - Check references thoroughly
- Don't fill the spot until the right person is identified. You will find a way to get by until the right person is identified.

Personality

- The right person, with the right drive and motivation will make the job of training and managing much more enjoyable.
 - Good work ethic
 - Teachable
 - Desire to grow
 - Always interested in the next step
 - Takes initiative when opportunities are recognized
 - Desire for leadership (helpful but not required)
 - Exceptional interpersonal skills
 - Willing to teach/ mentor others when appropriate



**Training:
Encourage
Growth By
Providing a
Work Path**

Getting Started-The First Day

- A well organized first day will help your new team member to know they've made the right decision in choosing your company for their career. Important things to include are:
 - Completion of required paperwork
 - Picture for name badge and ordering of business cards
 - Welcome introduction to key staff and Owner
 - Familiarization of facility and vehicles
 - Mapping of schedule including training and expectations for working independently
 - Discuss classroom training requirements
 - Tool requirements and purchase assistance
 - Review written job descriptions
 - Set appointment for formal company orientation including company manual, policies and procedures

New Hire Checklist and Due Date Calculator

Order	hire date	Titles	due date Calc			
1	11/21/2013	Employment Application	11/16/2013	28	Training Agreement	11/21/2013
2		Interview With Manager	11/16/2013	29	At Will Acknowledgement/Co. Handbook Agreement	11/21/2013
3		Interview With Owner/ Vice President	11/17/2013	30	Company Handbook	11/21/2013
4		Background check consent signed	11/17/2013	31	Policy and Procedure Manual	11/21/2013
5		Drivers License check consent signed	11/17/2013	32	Copy of S.S.# and Drivers license/ID Card	11/21/2013
6		Drug Consent	11/17/2013	33	Picture taken	11/21/2013
7		Healthsouth Directions	11/17/2013	34	Orientation Presentation	12/21/2013
8		Background check	11/17/2013	35	Business Cards ordered	11/21/2013
9		Check Drivers License w/ our insurance Co.	11/17/2013	36	Uniforms Ordered	11/21/2013
10		drug test taken	11/17/2013	37	Apply for Elec. trainee card	11/21/2013
11		Received results	11/18/2013	38	Entered into Quickbooks	11/21/2013
12		Assessment Test (if required)	11/19/2013	39	Added to Charter Bank Payroll system	11/21/2013
13		Ride Along With Technician	11/19/2013	40	Added to Goldmine/ Global Edge, Training Sched. to Accounting	11/26/2013
14		Signed Job Offer Agreement	11/21/2013	41	Bel Red Badge printed	11/26/2013
15		Company Policy Acknowledgment-Dress Code	11/21/2013	42	Ride Along With IAQ/ Duct Clean Technician	11/26/2013
16		Company Policy Acknowledgment-Safe Driving	11/21/2013	43	Ride Along With Comfort Consultant	11/26/2013
17		I-9 Immigration Form	11/21/2013	44	Ride Along With Install Crew	11/26/2013
18		W-4 Federal Tax Information	11/21/2013	45	Enroll In Service Class	12/21/2013
19		New Employee Data Form	11/21/2013	46	Train With Technician (see training schedule)	12/22/2013
20		Direct deposit authorization (need voided check)A deposit slip will not do	11/21/2013	47	VEHICLE SIGN OUT (if applicable, use vehicle sign out form)	12/22/2013
21		Uniform Agreement	11/21/2013	48	Code Book Issued and checked out	12/22/2013
22		Uniform Form	11/21/2013	47	Gas Card	12/22/2013
23		Payroll Calendar	11/21/2013	48	Phone and CC Slider	12/22/2013
24		Schedule Calendar	11/21/2013	49	Garmin Issued and checked out	12/22/2013
25		Tool List - Personal Tools(if applicable)	11/21/2013			
26		<u>Tool List - Company Tools(if applicable)</u>	11/21/2013			
27		<u>Tech tool recommendations</u>	11/21/2013			

Job Descriptions-Vision for the Future

- Reviewing the expectations lets the technician know there are required minimums and gives you the tools to enforce a plan for growth and improvement once they have been established:
 - Key goals may include:
 - Initial revenue targets
 - Licensing and certification timelines
 - Service Agreement standards
 - Equipment leads or sales expectations
 - Benchmarks for equipment knowledge

Job Descriptions

Service Tech Level 1

Reports To: Service Manager

Required Qualifications

- Demonstrate mechanical aptitude
- Valid drivers license
- Willingness to invest in tools used in the service of HVAC equipment
- Willingness to invest time in training seminars and classes.
- Operate power and hand tools safely
- Basic knowledge of electrical and refrigeration principles.
- Basic knowledge of service tools and testing devices.
- Acquire State of Washington Electrical trainee card
- Perform filter changes and do filter checklist paperwork unassisted.
- Enroll in HVAC course or in house training program
- Perform planned maintenance on furnaces only, with assistance of a Service Technician 3 or higher
- Perform preventative furnace repairs with prior approval from level 3 or higher.
- Follow directions as given.
- Work from E' step ladder.
- Commit to developing customer service skills

Duties, Roles & Responsibilities

- Arrive at jobsite at scheduled time and location as dispatched.
- Relocate from one jobsite to another jobsite as dispatched during the workday.
- Report to dispatcher when arriving and leaving jobsite.
- Operate company vehicle as needed.
- Follow instructions from supervisor and carry out in timely manner.
- Report problems with company tools or vehicle promptly.
- Report problems with equipment to Dispatcher to expedite parts delivery.
- Purchase required tools as listed.
- On call status for emergency service as required.
- Ability to work staggered schedule if required.
- Maintain professional appearance and attitude at all times.
- Complete all service related forms properly.
- Other duties as assigned.

Compensation/Benefits

Position pay range

-

Additional compensation

- Spiffs for planned maintenance agreements, new equipment leads, accessories sold, and exceeding revenue goals.

Medical insurance

- Medical insurance, 90 days after starting.
- Dental insurance, 90 days after starting.
- Vision insurance, 90 days after starting.
-

Tool Purchase Program

- Purchase of tools through payroll deduction program.

Training and Education

- Company pays % of initial training school required after hire date, employee responsibility payroll deducted over 1 year
- Periodic training from various equipment manufacturers, local utilities, national industry associations and Bel-Red Heating & Air Conditioning in-house training programs. Both mandatory and voluntary.

Holidays

- Paid holidays after first complete year.

Vacation

-
-

Service Tech Level 4

Reports To: Service Manager

Required Qualifications

- Ability to read and interpret wiring diagrams and blueprints.
- Be familiar with a wide range of equipment and troubleshooting techniques.
- Experience making repair and replace decisions.
- Have State of Washington low voltage electrical license.
- Have EPA Universal refrigerant handling certification.
- Advanced customer service skills.
- Acquire NATE certification within one year of employment as Service Tech 4.
- Demonstrate willingness to accept responsibility and leadership roles.
- Knowledge of basic sheet metal practices.
- Knowledge of air balancing principles and techniques
- Master all skills required for all previous tech levels.

Duties, Roles and Responsibilities

- Provide hand and power tools as listed for Service Technician 3.
- Troubleshooting equipment, make repair and replace decisions.
- Perform air balance with velometer or hood and recognize when and what problems exist from the test.
- Layout, design, and install low voltage wiring.
- Verify and coordinate HVAC building code compliance.
- Communicate clearly, the ideas and explanations of problems to customers and coworkers.
- Train, instruct and oversee other employees as directed by Service Manager.
- Calculate equipment efficiency.
- Converse with building and homeowners, general contractors, referring questions and/or problems to supervisor.
- Expected revenue to consistently exceed \$24,000 per month.
- Provide new equipment leads to the sales department.
- Acquire new residential planned maintenance agreements at 35% or higher.
- Renew residential planned maintenance agreements at 90% or higher.
- Maintain professional appearance and attitude at all times.
- Run "after hours" calls as required.
- Other duties as assigned.

Compensation/Benefits

Position pay range

-

Additional compensation

- Spiffs for planned maintenance agreements, new equipment leads, accessories sold, and exceeding revenue goals.

Medical insurance

- Medical insurance, 90 days after starting.
- Dental insurance, 90 days after starting.
- Vision insurance, 90 days after starting.
-

Tool Purchase Program

- Purchase of tools through payroll deduction program.

Training and Education

- Periodic training from various equipment manufacturers, local utilities, national industry associations and Bel-Red Heating & Air Conditioning in-house training programs. Both mandatory and voluntary.

Holidays

- Paid holidays after first complete year.

Vacation

Job Descriptions Cont.

Service Team Leader/ Tech 5 -- Revised 9/20/13

While still working in the field as detailed below, the Service Team Leader is responsible for ensuring that all service techs working on their team have the technical knowledge, skills and ability to meet or exceed the company's standards. This is done through the following:

Job Duties:

1. Work in the field as a Service Team Leader.
 - Take 4 to 5 service calls per day with average per ticket revenue \geq \$320
 - Provide technical assistance and support to Service Technicians, as needed, via phone during working hours and after hours
 - Provide coaching and mentoring to Service Technicians through on-the-job training and one-on-one meetings as indicated.
 - Encourage professional growth through participation in all available training.
 - Produce Leads and Maintenance Agreements based on individual goals (to be determined)
 - This position will be included in on-call rotation
2. Other duties as assigned.

Training:

1. This position will receive general orientation and ongoing job training from a variety of internal key staff
2. This position will be provided access to outside training as indicated.

Scheduled Work Hours:

1. This is a non-exempt (non-salary) position, unless otherwise noted.
2. Normal work schedule is approximately 40 hours per week.
3. Approximately 3/4 of scheduled work hours should be spent performing service related duties.
4. Approximately 1/4 of scheduled work hours should be spent performing mentoring duties.
5. Position will work a rotating 4 day/10 hour schedule, unless otherwise indicated.
6. Position will be available by phone after-hours and on weekends
7. Typical work hours will be: 7:00 am to 5:30 pm. Work hours are subject to change.

Compensation:

1. This is a NON-EXEMPT position.
2. Compensation will be paid as follows:
 -
 -
 - Lead Spiffs as follows:
 - \$__ per lead for systems-includes furnace, AC/HP, fireplace, generator, and tankless water heater

- \$__ per lead for accessories-includes water tanks, filtration, humidifiers, UV systems
- \$__ per sale of a system
- \$__ per sale of an accessory

- Comfort Guard Spiff

-
-
-
-
-

- Team Leader Bonus as follows:

-
-
-
-
-

3. Position will receive a service vehicle for business use, along with a fuel card.
4. Position will be entitled to vacation, holiday pay, and other benefits as detailed in the Employee Handbook.

Other:

1. The Service Team leader reports to the Service Manager. In the absence of a Service Manager, or as needed, the Service Team leader should seek the assistance of the General Manager or Owner.
2. The Service Team leader will be subject to a background check and drug screen prior to employment, and on an ongoing basis per general company policy as detailed in the Employee Handbook.

New Hire Training

- Getting started on the right foot gives the new employee the confidence to perform their job well.
 - Departmental ride along orientation- First week
 - Adequate on the job training- 3-6 weeks
 - Outside school/ training requirements (HBTI, Renton Vo. Tech., Bellingham Tech. Coll., Soft skills, etc.)- First 5-6 months
 - Tool and vehicle checkout- After on the job training
 - Formal team announcements- Congratulating key milestones

Training Plan

- Every manager should have a developed plan for each of their employees.
 - Meet monthly to review goals and performance
 - Prioritize needs and develop short-term and long-term goals to meet those needs.
 - Short-term goals deal with specific and essential performance shortcomings.
 - Work flow
 - Specific skills and/or techniques
 - Etc.
 - Long-term goals deal more with professional growth
 - People management
 - Advanced skills
 - New skills necessary for career advancement
 - Etc.
 - Allow the employee to give input for their goals.

Training Schedule

Phase 1- 30 Day Ride Along Training

	Trainer	Due Date	Complete	Trainee Initial	Notes
Orientation					
Paperwork filled out and filed	Svc. Mngr.	11/21/13			
Company Tour/ Introductions	Svc. Mngr.	11/21/13			
Company Handbook	Svc. Mngr.	11/21/13			
New Employee Manual and Ride-A-Long					
Policy and Procedure Signoffs	Svc. Mngr.				
"The Perfect Service Call"	Svc. Mngr.				
Furnace Tune Procedures-Handout	Svc. Mngr.				
AC/HP Tune Procedures-Handout	Svc. Mngr.				
Startup Procedures-Handout	Svc. Mngr.				
Furnace Tune Procedures	Team Lead				
AC/HP Tune Procedures	Team Lead				
Startup Procedures	Team Lead				
The Invoice	Team Lead				
Comfort Guard Agreements-Renewal	Team Lead				
Parts List and Recognition	Team Lead				
Schedule-4/10's	Svc. Mngr.				
Tech Level and Pay Schedule	Svc. Mngr.				
Spiffs	Svc. Mngr.				
On Call	Svc. Mngr.				
Setting the Lead	Team Lead				
Completing Calls/ Debriefing	Team Lead				
Text Messaging	Team Lead				
Warranty Calls	Team Lead				
Call Backs-Customer Expectations and	Team Lead				
Call Backs-Escalation Procedure	Team Lead				
Time Sheets	Team Lead				
Overtime	Svc. Mngr.				
Tools	Svc. Mngr.				
High Demand Procedure	Svc. Mngr.				
Mandatory Overtime	Svc. Mngr.				
Cell Phone Use Policy	Svc. Mngr.				
Recommended Repairs	Team Lead				
Personal Use Policy	Svc. Mngr.				
Accident Policy	Svc. Mngr.				
Labels, Magnets and Door Hangers	Team Lead				
Ride Alongs					
Field Supervisor ride along	Field Sup.				
Maint. Tech ride along	Tech				
IAQ/Duct Clean ride along	IAQ Tech				
Sales ride along	Sales				
Install ride along	Install				
Hands On Training					
Ride With Trainer	Lead Tech				
Complete Furnace Tune	Lead Tech				
Complete paperwork	Lead Tech				
Complete simple repairs	Lead Tech				
HBTI Class 1 and 2 completed	HBTI Trainer				
Misc.					
Vacation Requests	Svc. Mngr.				
Holidays	Svc. Mngr.				
Pay Schedule	Svc. Mngr.				
Recommendations	Lead Tech				
Vendors	Lead Tech				

The Perfect Service Call- The One Percenters

- It is important to establish standards for all technicians to follow. As the first, and sometimes only, physical representation of your company, it is imperative that they leave a lasting, positive impression.
 - Pre-appointment check for hygiene, cleanliness, breath, etc.
 - Parking and cone placement
 - Door knock, customer introduction, business cards, floor savers
 - Rapport building, discovery
 - Diagnostics and regular customer involvement
 - Repair/ replace options
 - Improvement options
 - Maintenance agreement
 - Collection
 - Clean up/ “One extra thing”

First Month Review- The Plan

- After working independently for one month, it is important to review initial performance and allow for feedback
 - Track/ record all areas that are important to you
 - Recognize strengths and congratulate them
 - Review areas of weakness and develop a plan to overcome them
 - Have a few specific examples:
 - Customers
 - Invoices
 - Office feedback

“Every employee is different, but the expectations for each position should always be the same.”

On Track Report

TECHNICIANS NAME Adam Smith

MONTH

MONTH	ADJUSTED REVENUE	GROSS REVENUE	# OF SERVICE TICKETS	AVG. REVENUE PER TICKET	TOTAL TECHNICIAN HOURS	AVG REVENUE PER HOUR	MONTHLY REVENUE GOAL	% OF GOAL	TOTAL CALL BACK HOURS	\$ FOR 10	UNBILLABLE TIME	MISSED BILLING HOURS	MISSED BILLING DOLLARS	\$ FOR 10 WITH MISSED BILLING HOURS
January	\$ 23,464.85	\$ 21,681.25	79.00	\$ 274	159.85	\$ 136		#DIV/0!	0.00	6.61	3.49	0.00	\$ -	6.61
February	\$ 24,035.12	\$ 17,595.65	55.00	\$ 320	126.65	\$ 139		#DIV/0!	0.00	6.26	1.83	0.00	\$ -	6.26
March	\$ 29,363.40	\$ 29,489.00	72.00	\$ 410	173.74	\$ 170		#DIV/0!	0.00	6.58	3.92	0.00	\$ -	6.58
April	\$ 21,308.66	\$ 16,941.00	64.00	\$ 265	137.54	\$ 123		#DIV/0!	0.00	6.55	5.75	0.00	\$ -	6.55
May	\$ 25,606.41	\$ 23,774.00	74.00	\$ 321	160.62	\$ 148		#DIV/0!	0.00	6.89	3.08	0.00	\$ -	6.89
June	\$ 25,009.78	\$ 19,817.00	56.00	\$ 354	137.08	\$ 145		#DIV/0!	0.00	5.78	4.91	0.00	\$ -	5.78
July	\$ 27,954.66	\$ 29,842.00	73.00	\$ 409	184.68	\$ 162		#DIV/0!	0.00	5.94	5.09	0.00	\$ -	5.94
August	\$ 25,903.97	\$ 28,141.00	78.00	\$ 361	187.94	\$ 150		#DIV/0!	0.00	5.86	3.49	0.00	\$ -	5.86
September	\$ 32,068.17	\$ 30,867.00	77.00	\$ 401	166.52	\$ 185		#DIV/0!	0.00	6.69	0.00	0.00	\$ -	6.69
October	\$ 29,008.34	\$ 26,686.00	66.00	\$ 404	159.15	\$ 168		#DIV/0!	0.00	5.73	3.17	0.00	\$ -	5.73
November	\$ 28,671.25	\$ 5,954.67	16.00	\$ 372	35.93	\$ 166		#DIV/0!	0.00	5.68	0.00	0.00	\$ -	5.68
December	#DIV/0!	\$ -	0.00	#DIV/0!	0.00	#DIV/0!		#DIV/0!	0.00	#DIV/0!	0.00	0.00	\$ -	#DIV/0!
	\$319,468.04	\$ 250,788.57	710.00	\$ 353	1629.70	\$ 154	\$ -	#DIV/0!	0.00	6.27	34.73	0.00	\$ -	6.27

MONTH	Maintenance Agreements						Leads		
	New Maintenance Opportunities	New Maintenance Sold	Maintenance Renewal Opportunities	Maintenance Renewed	NEW MTC %	RENEWAL MTC%	Goal	Actual	Goal Vs. Actual
January	36	15	22	18	42%	82%		24.00	#DIV/0!
February	15	4	16	13	27%	81%		16.00	#DIV/0!
March	19	6	25	22	32%	88%		20.00	#DIV/0!
April	13	7	20	18	54%	90%		12.00	#DIV/0!
May	15	3	16	12	20%	75%		15.00	#DIV/0!
June	15	7	21	18	47%	86%		12.00	#DIV/0!
July	35	15	16	13	43%	81%		11.00	#DIV/0!
August	30	11	23	17	37%	74%		8.00	#DIV/0!
September	30	15	6	5	50%	83%		16.00	#DIV/0!
October	31	8	9	9	26%	100%		14.00	#DIV/0!
November	8	1	1	1	13%	100%		2.00	#DIV/0!
December	0	0	0	0	#DIV/0!	#DIV/0!		0.00	#DIV/0!
	247	92	175	146	37%	83%	0	15000%	#DIV/0!

Call Time Review		
Time On Site	Hours Per Billable Call	Average Travel Time
-22.46	1.90	24
-31.41	2.17	34
-20.43	2.17	23
-26.74	1.94	29
-24.29	1.89	26
-25.46	2.18	28
-22.76	2.33	25
-23.62	2.25	26
-25.56	1.98	28
-27.15	2.23	29
-23.40	2.06	25
#DIV/0!	#DIV/0!	#DIV/0!
-24.76	2.10	27

PERFORMANCE:

8 For 10
 Average Ticket Price
 Mtc. Sold
 Mtc. Renewed
 Average Billing Per Month
 Unbillable Time
 Callbacks
 Lead Generation
 Additional Comments

Goal	Exceeds Goal	Meets Goal	Below Goal	Comments
8.00			X	
\$450.00			X	
55%			X	
90%	X			
\$30,000.00		X		
5				
1		X		
10	X			

The Ride-A-Long

- A regular ride-a-long with written feedback shows consistency and commitment to the success of your team.
 - You can observe real areas requiring additional training
 - You will recognize any gaps in your training program
 - You can provide immediate coaching on one or two key areas
 - You may uncover potential morale concerns and address them before losing good technicians

Ride-A-Long Evaluation

TECHNICIAN RIDE-ALONG EVALUATION CRITERIA

Technician:

Evaluation Date:

HYGIENE/APPEARANCE

	Meets Expectations	Needs Improvement
Clean shaven		
Clean haircut		
Clean/Pressed uniform		
Black shoes/boots		
Black belt		
Satisfactory body/breath odor		
Tool bag clean/organized		

Recommendations/Notes:

VEHICLE MAINTENANCE

	Meets Expectations	Needs Improvement
Truck washed		
Vacuumed		
Appropriate stock levels		
Parking cone present		
Garbage can utilized		
Neat/organized vehicle		

Recommendations/Notes:

PROCEDURE

	Yes	Needs Training
Shoe covers		
Business cards		
Knock on door (don't ring the doorbell first)		
Proper greeting-Smile, 2 business cards and a handshake		
Speak with cust, verify purpose of call, ask questions		
Test fire equipment from t-stat to ensure it functions normally		
Customer approval/sign. rcvd. on recom. prior to starting work		
Ask if there is anything else we can do for them today		
Stickers (on all equip Bel Red can service)		
Price Book		

Complete invoice, including equip. mod. and ser. #'s
 Time sheets are complete and legible
 Return T-stat to previous settings
 Retrace steps to insure no tools or equipment have been left
 Repairs priced accurately per price-book, and totaled correctly
 CGA explained thoroughly and offered
 CGA discount shown and calculated properly
 Financing offered using finance worksheet
 Lead scheduled at time of service (if applicable)
 Tax Totaled correctly
 Payment collected, including processing of credit cards
 Shake hands before leaving and thank them for their business

Recommendations/Notes:

PRECISION TUNE-UP (FURNACE/HP/AC) FUNDAMENTALS

	Yes	Needs Training
Able to explain sequence of operations for a furnace?		
Able to describe major components/functions of system?		
Knowledge of component testing (i.e. CAP/mfd)		
Test fire unit before beginning		
Proper sequence for diagnosis/recommendation/finish		
Clear understanding of precision gas tune-up procedure?		
Invoice is clean and legible?		
Detailed description of work performed?		
Clear understanding of system diagnostics/troubleshooting?		

Recommendations/Notes:

CLIENT SOLUTIONS/SALES FUNDAMENTALS

	Yes	Needs Training
Knowledge of accessories(benefits/pricing/install)		
Relational ability to connect with client		
Lead ops. identified for sis, aud, DC, plimbg, etc. as appropriate		
Asks and phrases questions appropriately		
Ability to close recommendations/overcome objections		
Ability to generate new maintenance agreements		
Knowledgeable of product/service offerings		

Development Plans- Addressing Underperformance

- Defining when to A.C.T.
 - When all other coaching does not produce the necessary results, it may be time to implement a development plan.
 - Unlike evaluations, development plans target the few key areas that require improvement and clearly outline the minimum requirements with absolute timelines to meet the expectations.

Development Plan- Example

Development Plan

For John Smith 10/06/13

Revenue per ticket: break even 240, plan 200... current \$247.00

Add-ons:

Choose 2 add-on sales items per month to focus on. Set goal for revenue per day/week and month based on goals. Continue each month for 3-months. Be consistent.

Month	Revenue Increase Goal	Add-On Product	Sales Goal per Day/Week/Month
October	\$4,000	2	\$1,200/\$4,800/\$20,200
November	\$6,000	3	\$1,300/\$5,200/\$22,100
December	\$7,000	4	\$1,400/\$5,600/\$23,800

Repairs and Maintenance:

Continuous months below breakeven contributes to the departments inability to be profitable. The expense can be absorbed only if qualified leads are provided to offset the deficit. With skills learned on the job, consistent revenue and lead production is expected. Previous months have shown ability in this area. Focus on consistency in billing and avoiding billing errors. Be sure to capture either the lead or the repairs from the calls. Too much time with no repairs or leads drastically reduces it for 10 ratio and reduces per call/ per hour revenue. Additional accessories will also increase per call revenue.

Leads: Goal 20, avg. of 6/mo. last 3 months

Set goal based on earnings target and opportunities per day/week/month. Fall and winter season provides many additional opportunities for customers to invest in higher efficiency equipment. Solid lead production is expected.

Month	Lead Goal	Leads Needed	Sales Goal per Day/Week/Month
October	12	7	1/3/12
November	16	11	1/4/16
December	20	15	1/5/20

Qualified Leads:

Skill has been shown in recognizing customer needs for equipment. Spend more time qualifying leads with customer. Create solid leads through customer education (ex. visual confirmation of heat exchangers, literature), immediate call in and scheduling, and clear communication about the process with customer. Develop a relationship with the customer. Build trust.

Maintenance net growth: New 4/31, renew 14/21, expected: 30% Net Growth

Set goal based on earnings target and opportunities per day/week/month. Increase in repair opportunities will improve this category. Be sure customer is aware of savings and scheduling benefits of the CGA program. Promote the equipment benefits and the manufacturer's recommendations for annual maintenance.

Month	CGA Increase Goal	CGA's Needed	CGA Goal per Day/Week/Month
October	50%	5 more new, 2 renewals	30% new, 85% renew
November	60%	6 more new, 3 renewals	33% new, 88% renew
December	50%	7 more new, 4 renewals	35% new, 90% renew

Maintenance customers are guaranteed work for the future. Losses in this area result in decreased customer base. Losing any customers is costly, especially if they aren't replaced. Net growth is calculated by adding the new and renewed CGA's and subtracting the renewal opportunities. Lower renewal rates along with few new CGA investments result in a net monthly loss. Currently at a net loss for the year of 35 CGA's through August. On track for first positive number for the year in September.

Other: Focus on improving all three categories monthly to meet goals. Strive for consistent growth and avoid sporadic growth in one or two areas. Goals are based on tech level sheets and personal skill set. Advancement, compensation, and long term success are also based on these criteria. Losses are anticipated during training periods only. Net gains in customers and revenue are expected from trained technicians. Profitability is regularly evaluated to determine future employment.



**Pruning the
Tree:
When to Coach
and
When to Cut**

Coaching and Training

- If this person does not have the **ABILITY** or **CORE VALUES**, but has received the training, you should have no guilt about moving them out.
- If they possess the **ABILITY** and the **CORE VALUES**, but have **NOT** had the **TRAINING**, then it is our responsibility to provide the required training opportunities.

A+C = Training

Termination: Pruning the Tree

- Pruning a tree is difficult work and makes the tree awkward for a bit. But the tree has more energy to devote to growth and is healthier in the long run.
- When you've done your job teaching, coaching and documenting, termination is not the last option, it is the BEST option.
 - By eliminating staff that perform poorly, you demonstrate to other staff members that similar behaviors are not acceptable, and you set consistent expectations.
 - By eliminating staff that have a negative impact on the morale of others, you immediately improve morale.
 - Good staff members will always step into the void left by a bad employee to make sure the work gets done.