

Accounting Job Training Track

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Pilot - How to Master a Thriving Residential HVAC Service Business

1. 1-hour part-one:

- a. How to implement a strategic business action plan
- b. How you only need employees in your business to process your book of business.
- c. How company operating and work delivery processes are for employees to follow.
- d. How you only need Manager Job Training Tracks in your business to manage your people to process.
- e. How to staff up to 100% utilization of available labor to prevent higher operating costs than your competitors.
- f. **Subscription provided or purchase these documents:**
 - i. N/A

#5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

1. 1-hour - #5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards #1:

- a. How to get input and buy-in from all work delivery stakeholders.
- b. Review the business functions that must occur to be in business.
- c. Review why we need written work delivery standards.
- d. Review from a lead to job close out best practice service repair work delivery standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1015	Service Repair Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to repair job closeout. Service managers and operations managers use them. This document is provided in original Microsoft Word format to be printed on your local printer.	\$159.95
1018	Equipment Start-up & Maintenance Tasking Procedures These documents are used by service managers, installation managers, technicians, installers, and operations managers. HVAC service companies use this equipment start-up, text, and verification tasking procedures to adhere to the new ASHRAE standard 180P standards. These tasking procedures help you establish the minimum HVAC inspection and maintenance requirements that preserve a system's ability to achieve optimum operations. AccuTask includes 136 start-up and maintenance tasking forms for 99.9% of HVAC equipment and systems. These documents are provided in original Microsoft Word format to be printed on your local printer.	\$159.95

2. 1-hour - #5 How to Stop Inefficiencies with Proven Service Agreement Work Delivery Standards Part #2:

- a. Review from a lead to job close out, best practice written service agreement work delivery standards.
- b. **Subscription provided or purchase these documents:**

Product ID 1016	<i>Service Agreement Work Delivery Standard Procedures</i> Includes step-by-step work delivery tasking standards from a lead to service agreement job closeout. Service managers and operations managers use them. This document is provided in original Microsoft Word format to be printed on your local printer.	\$159.95
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3. 1-hour - #5 How to Stop Inefficiencies with Proven Replacement Work Delivery Standards Part #3:

- a. Review from a lead to job close out, best practice written system replacement work delivery standards.
- b. Creating a Project/Design-Build Statement of Qualifications.
- c. Example: Cover Letter and Statement of Qualifications.
- a. **Subscription provided or purchase these documents:**

Product ID 1017	<i>System Replacement Work Delivery Standard Procedures</i> Includes step-by-step work delivery tasking standards from a lead to Project/Design-Build agreement job closeout. Service managers and operations managers use them. This document is provided in original Microsoft Word format to be printed on your local printer.	\$159.95
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4. 1-hour - #5 How to Stop Inefficiencies with Proven Quality Assurance Standards Part #4:

- a. Review best practice quality assurance standards.
- b. Review best practice accounts receivable and payable standards.
- c. How to define your credit terms.
- d. Review how to create an accounts receivable aging report.
- e. Review of other best practice account receivable procedures.
- a. **Subscription provided or purchase these documents:**

Product ID 1019	<i>Accounts Receivable and Payable Standard Procedures</i> Includes step-by-step accounting receivable and payable standards. General managers and operations managers use them. This document is provided in original Microsoft Word format to be printed on your local printer.	\$99.95
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5. 1-hour - #5 How to Stop Inefficiencies with Inventory and Labor Optimization Standards Part #5:

- f. Review best practice inventory control standards.
- g. Review effective customer care call handling standards.
- h. Review the customer billing or invoicing requirements.
- i. Review proven field labor optimization strategies.
- j. Review how to implement an effective performance monitoring & reporting process.
- a. **Subscription provided or purchase these documents:**

Product ID 1020	<i>Inventory and Tool Control Standard Procedures</i> Includes step-by-step company job and truck inventory control standards. General managers, service managers, and operations managers use them. This document is provided in original Microsoft Word format to be printed on your local printer.	\$99.95
Product ID 1021	<i>Effective Customer Care Call Handling Standard Procedures</i> Arming the dispatcher with a professional standardized way to great and respond to customer inquiries to include: <ul style="list-style-type: none"> • Greeting the Customer • Identify How Customer Will Pay for Today's Work • Informing the Customer of Response Time: • Identifying the Lead Source • Reminding the Customer of What Happens Next • Calling to Reschedule the Appointment 	\$99.95

#8 How to Drive Profitability Using Key Performance Indicators

- 1. **1-hour:**
 - a. How to track business income and expenses.
 - b. How to use KPIs to keep your business on the right track.
 - c. How to establish individual opportunity conversion & productivity KPIs.
 - d. How to establish financial KPIs with rules-based management.
 - e. How to calculate your break-even revenue to cover overhead and NPBT.
 - f. Review the power of using KPI' to increase profitability.
 - g. **Subscription provided or purchase these documents:**
 - i. N/A

#11 How to Forecast Your Monthly Spend Plan

- 1. **1-hour:**
 - a. Why You Need a Monthly Spend Plan Budget.
 - b. Forecasting Labor Staffing Requirement by Work Category Procedure.
 - c. Using BudgetPro to Develop Service Offerings Spend Plans.
 - a. **Subscription provided or purchase these documents:**

Product ID 1031	BudgetPro Annual & Monthly Budgeting Calculator One of the critical factors in delivering service is the availability of skilled labor. Retaining and obtaining the right number of employees with the right skill sets is crucial to the service organization. Determining the right mix of employees requires forecasting future revenues by work category. BudgetPro is an annual and monthly labor and material forecasting program designed to automate all work categories' forecasting and budgeting process. The BudgetPro program is designed to help you quickly respond to potential new business scenarios. This program is provided in Microsoft Excel format.	\$159.95
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#13 How to Select and Implement Field Management Software

1. **1-hour:**
 - a. Benefits of Field Service Management Software.
 - b. Checklist for Selecting Field Service Management Software.
 - c. **Subscription provided or purchase these documents:**
 - i. **N/A**

#14 How to Self-Develop Your Leadership and People Skills

1. **1-hour:**
 - a. Different Leadership Styles and When to Use Them.
 - b. The Top Leadership Skills to Improve.
 - c. Implement Your Leadership Skill Self-Development Plan.
 - d. **Subscription provided or purchase these documents:**
 - i. **N/A**

