

# Comfort Advisor Job Training Track

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## Pilot - How to Master a Thriving Residential HVAC Service Business

### 1. 1-hour:

- 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

## #1 How to Price Your HVAC Services to Make a Fair Profit

### 2. 1-hour - #1 How to Stop Underpricing Your Service Agreements to Make a Fair Profit Part #3:

- a. Review best practice upfront flat rate system replacement price guide.
- b. Step #1 - Determining your flat rate replacement hourly onsite truck and travel cost rate.
- c. Step #2 - Determining your flat rate replacement 2-man crew labor cost rate.
- d. Step #3 - Determining your flat rate replacement warranty support cost rate.
- e. **Subscription provided or purchase these documents:**

<b>Product ID</b> <b>1003</b>	<b><i>Technician/Installer Onsite Hourly and Truck and Travel hourly Pricing Calculator Program in Microsoft Excel</i></b> This document is used by service and replacement management to calculate the upfront per trip truck and travel rate for your upfront repair and replacement price guides. This document is provided in Microsoft Excel format with results printed on your local printer.	<b>\$69.95</b>
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## #2 How to Stop Missing Your Fair Share of Service Opportunities

### 1. 1-hour - #2 How to Stop Missing Your Fair Share of Replacement Opportunities via Onsite Survey Part #3:

- a. Review the onsite system replacement opportunity assessment form.
- b. Review the Installed-Right Solution Survey form.

- c. Review the system condition survey form.
- d. Learn how to use the duct & flue tables to verify ductwork capacities.
- e. Review the inside equipment survey form.
- f. Review the outside equipment survey form.
- g. **Subscription provided or purchase these documents:**

<b>Product ID</b>           <b>1006</b>	<p><b><i>Onsite System Replacement Opportunity Assessment Form</i></b></p> <p>The On-site System Replacement Opportunity Assessment Survey Form assists the Selling Technician or Comfort Advisor to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right objectives are to help the Selling Technician or Comfort Advisor:</p> <ul style="list-style-type: none"> <li>• To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements.</li> <li>• To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost.</li> <li>• To provide the means to project a professional image.</li> <li>• Systematically gather customer &amp; technical info.</li> <li>• To provide the means to demonstrate performance via your best practice project installation approach.</li> <li>• To educate and move the customer from the lowest cost option to the BEST option.</li> </ul> <p>To provide the means to complete the sales call and close the transaction in 1 sales call.</p>	<b>\$99.95</b>
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#### #4 How to Harvest More Business with Proactive Selling Strategies & Tactics

1. **1-hour - #4 How to Harvest More Business with Proactive Selling Strategies & Tactics Replacement Trust Selling Part #3:**
  - a. Review the system replacement business.
  - b. Review of proactive trust-selling system replacement standards.
  - c. **Subscription provided or purchase these documents:**

<b>Product ID</b>           <b>1009</b>	<p><b><i>Proactive Replacement Trust-Selling Standards Procedures</i></b></p> <p>The selling technician and comfort advisors use this selling standard procedure to perform the step-by-step functions of professional project/design-build sales and operations from a lead to booking a sold replacement job. This document is provided in original Microsoft Word, Excel, PowerPoint, and Acrobat PDF format to be printed on your local printer.</p>	<b>\$99.95</b>
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<b>Product ID</b>  <b>1010</b>	<b>Replacement Sales Presentation (This is included in our Home Comfort Flat Rate Price Guide)</b> This promotional tool is used by selling technicians and comfort advisors on a request for bid/estimate/quote to systematically overcome 4-common sales objections, (1) What makes your company different?, (2) What regulatory compliant approach you will use to obtain the lowest possible price, (3) Why your Company has to set the standard of performance in the area, (4) What the customer can expect before, during, and post-installation, and (5) Investment Option Price Sheet to provide an upfront itemize and logical installation sequence and price to the customer. This promotional contract is provided in original Microsoft PowerPoint format to be printed on your local printer.	<b>\$99.95</b>
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## #5 How to Drive Operating Efficiencies with Work Delivery Tasking Standards

### 1. 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:**

<b>Product ID</b>  <b>1017</b>	<b>System Replacement Work Delivery Standard Procedures</b> 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.	<b>\$159.95</b>
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## #6 How to Protect the Business with Proper Terms & Conditions

### 1. 1-hour:

- a. Review how your invoice or proposal agreement is a business contract.
- b. Review service repair payment & liability protection terms & conditions.
- c. Service agreement payment & liability protection terms & conditions.
- d. System replacement payment & liability protection terms & conditions.
- e. **Subscription provided or purchase these documents:**

<b>Product ID</b>  <b>1022</b>	<b>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</b> <ul style="list-style-type: none"> <li>• A strong set of terms and conditions is critical. It circumvents any confusion about what you are selling and the transaction terms by which you make the offer. Your payment and liability terms and conditions agreement are both a social and a legal contract. Your terms and conditions establish how you do business in a socially acceptable manner. Still, it is also a legally binding contract between you and your clients.</li> </ul>	<b>\$99.95</b>
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## #7 How to Retain the Best People with Proven Employee Retention Strategies

1. **1-hour - #7 How to Retain the Best People with Proven Employee Retention Strategies Part #1:**
  - a. Review how to implement work delivery standards.
  - b. Review how to implement performance-based job descriptions.
  - c. Review how to implement labor billable efficiency & productivity monitoring process.
  - d. Review how to implement a company culture of success.
  - e. Review how performance incentives help achieve business objectives by adhering to a high standard code of conduct.
  - f. Review a best practice performance incentive plan for office staff, technicians, selling technicians, and Installers.
  - g. Review a best practice performance incentive plan for comfort advisors.
  - h. **Subscription provided or purchase these documents:**

<p><b>Product ID</b></p> <p><b>1023</b></p>	<p><b><i>Complete Set Performance-Based Job Descriptions</i></b>            These documents are used by general managers, Sales Managers, service managers, installation managers, and operations managers. These documents are provided in Microsoft Word format to be printed on your local printer. Set includes:</p> <ul style="list-style-type: none"> <li>● Dispatcher Job Description</li> <li>● Comfort Advisor Job Description</li> <li>● Service &amp; Maintenance Technician Job Description</li> <li>● HVAC Installer Job Description</li> <li>● General Manager Job Description</li> <li>● Operations Manager job description</li> <li>● Sales Manager Job Description</li> <li>● Service Manager Job Description</li> <li>● Installation Manager Job Description</li> <li>● Human Resource Manager Job Description</li> <li>● Comptroller Job Description</li> <li>● Project Manager Job Description</li> <li>● Assistant Service Manager Job Description</li> <li>● HVAC Technician Instructor-Trainer Job Description</li> <li>● Lead Service &amp; Maintenance Technician Job Description</li> <li>● Receptionist/Customer Care Specialist Job Description</li> <li>● Office Manager Job Description</li> <li>● Accounts Payable Job Description</li> <li>● Accounts Receivable Job Description</li> <li>● Truck Driver/Warehouse Supervisor Job Description</li> </ul>	<p><b>\$99.95</b></p>
<p><b>1024</b></p>	<p><b><i>Performance Incentive plan - Office, Technicians &amp; Installer</i></b>            Service managers and operations managers use this document. This document is provided in original Microsoft Word format to be printed on your local printer.</p>	<p><b>\$69.95</b></p>

<b>Product ID</b> <b>1025</b>	<b>Performance Incentive plan - Comfort Advisor</b> Service managers and operations managers use this document. This document is provided in original Microsoft Word format to be printed on your local printer for only \$69.95.	<b>\$69.95</b>
<b>1029</b>	<b>Employment Application</b> This job or employment application is an official form given to applicants asking a wide range of questions both about the individual and their skills related to the job. Forms are legally defensible and stand as a way for applicants to introduce themselves to employers. Employees can be justifiably terminated for providing false information on this document that may be found post-hire. his document is provided in original Microsoft Word format to be printed on your local printer.	<b>\$69.95</b>

**2. 1-hour #7 How to Stop Losing Good People with Proper Hiring & Retention Customer Care & Dispatch Part #2:**

- a. Review the onsite system replacement opportunity assessment form.
- b. Review the Installed-Right Solution Survey form.
- c. Review the system condition survey form.
- d. Learn how to use the duct & flue tables to verify ductwork capacities.
- e. Review the inside equipment survey form.
- f. Review the outside equipment survey form.
- g. **Subscription provided or purchase these documents:**

<b>Product ID</b>  <b>1006</b>	<b>Onsite System Replacement Opportunity Assessment Form</b> The On-site System Replacement Opportunity Assessment Survey Form assists the Selling Technician or Comfort Advisor to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right objectives are to help the Selling Technician or Comfort Advisor: <ul style="list-style-type: none"> <li>• To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements.</li> <li>• To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost.</li> <li>• To provide the means to project a professional image.</li> <li>• Systematically gather customer &amp; technical info.</li> <li>• To provide the means to demonstrate performance via your best practice project installation approach.</li> <li>• To educate and move the customer from the lowest cost option to the BEST option.</li> </ul> To provide the means to complete the sales call and close the transaction in 1 sales call.	<b>\$99.95</b>
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