

Installation Manager Job Training Track

Take any Job Training Track 24/7.

Click the class link below to take a class now and pay \$49.95.

To order forms, tools, and documents, click [here](#).

Wish to discuss this, email us at News@WendellBedell.com or call 800-240-2823.

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

1. 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:**

Product ID 1003	Technician/Installer Onsite Hourly and Truck and Travel hourly Pricing Calculator Program in Microsoft Excel 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.	\$69.95
----------------------------------	--	----------------

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

1. 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
----------------------------------	---	----------------

2. 1-hour - #5 How to Stop Inefficiencies with Inventory and Labor Optimization Standards Part #5:

- a. Review best practice inventory control standards.
- b. Review effective customer care call handling standards.
- c. Review the customer billing or invoicing requirements.
- d. Review proven field labor optimization strategies.
- e. 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
1021	<i>Effective Customer Care Call Handling Standard Procedures</i> Arming the dispatcher with a professional standardized way to greet 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

#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>Product ID</p> <p>1023</p>	<p><i>Complete Set Performance-Based Job Descriptions</i> 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"> • Dispatcher Job Description • Comfort Advisor Job Description • Service & Maintenance Technician Job Description • HVAC Installer Job Description • General Manager Job Description • Operations Manager job description • Sales Manager Job Description • Service Manager Job Description • Installation Manager Job Description • Human Resource Manager Job Description • Comptroller Job Description • Project Manager Job Description • Assistant Service Manager Job Description • HVAC Technician Instructor-Trainer Job Description • Lead Service & Maintenance Technician Job Description • Receptionist/Customer Care Specialist Job Description • Office Manager Job Description • Accounts Payable Job Description • Accounts Receivable Job Description • Truck Driver/Warehouse Supervisor Job Description 	<p>\$99.95</p>
<p>1024</p>	<p><i>Performance Incentive plan - Office, Technicians & Installer</i> 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>\$69.95</p>
<p>1025</p>	<p><i>Performance Incentive plan - Comfort Advisor</i> 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.</p>	<p>\$69.95</p>

Product ID 1029	Employment Application 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.	\$69.95
--------------------------------------	--	----------------

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

- a. Review how to hire for the customer care and dispatch function.
- b. Review a best practice on training the customer care and dispatch function.
- c. **Subscription provided or purchase these documents:**

Product ID 1026	Customer Care Call Handling Inbound and Outbound Script This script includes a professional standardized way to greet and responds to the customer inquiries. The script includes greeting the customer, identifying if they are interested in a service agreement, annual service agreement renewal reminder, identifying how the customer they pay for today's work, informing the customer of response time, identifying the lead source, calling the customer to confirm arrival time, managing the price of today's service, calling to reschedule an appointment, handling upset callers. This document is provided in original Microsoft Word format to be printed on your local printer.	\$69.95
1027	Customer Care Response for "Price is Too High" Objection Used by customer care, receptionist, and dispatchers. This document is designed to inform employees and your customers why we price our services, justifying the price to the customer post service. Includes a professional standardized way to respond to a price objection via letter or email. This document is provided in original Microsoft Word format to be printed on your local printer.	\$69.95

#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

#9 How to Efficiently Organize the Business for Growth

1. 1-hour:

- a. Residential HVAC Business Must-Do Tasking Functions Review.
- b. Office Admin Department Functions & Organizational Structure.
- c. Sales Department Functions & Organizational Structure.
- d. Service Department Functions & Organizational Structure.
- e. Installation Department Functions & Organizational Structure.
- f. Construction Department Functions & Organizational Structure.
- g. **Subscription provided or purchase these documents:**

Product ID 1028	Residential HVAC Service Contractor Organizational Charts Whether you are a one-person or a 200-person HVAC company, both perform the same business operating and work delivery functions. Each business function requires labor tasking to complete. What labor is needed depends on how much labor tasking is necessary to process the company's book of business. No two companies have the same amount of labor tasking by business or work delivery function due to their mix of business types (e.g., construction, service, replacements, property management, building warranty companies, and others. However, all residential HVAC companies should be organized in such a way as to compete competitively.	\$69.95
-------------------------------	---	----------------

#10 How to Implement Proper Customer Care Call Handling Procedures

1. 1-hour:

- a. Importance of Good Customer Care.
- b. Customer Care Inbound and Outbound Call Handling Script.
- c. Crucial Hiring Criteria for the Customer Care & Dispatcher Function.
- d. Organizing an Office Central Filing System.
- e. Implement Hiring guidelines for the Customer Care/Dispatch Function.
- f. Customer Service 101: Proper Phone Etiquette.
- g. Implement Training for the Customer Care/Dispatch Function.
- h. **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.

d. **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. Provided in Microsoft Excel format.	\$159.95
--------------------------------------	---	-----------------

#12 How to Recruit and Retain Top Performers

1. **1-hour - #12 How to Recruit and Retain Top Performers Coaching & Counseling Staff Part #3:**
 - a. Making the Job Offer
 - b. Assessing New Hire Training Needs
 - c. The Top Reasons Why Continuous Job Training is Necessary
 - d. The Coaching Process to Develop the Team and Individuals
 - e. The Counseling Process to Change Troublesome Work Behaviors.
 - f. **Subscription provided or purchase these documents:**

Product ID 1030	Employee Counseling Form This document is used by service managers, installation managers, operations, and office managers. This document is provided in original Microsoft Word format to be printed on your local printer.	\$69.95
--------------------------------------	--	----------------

#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**