

Marketing Manager 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.
- a. **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 Price Your HVAC Services to Make a Fair Profit Part #1:

- a. Selling based on value - not price
- b. Get paid for the 90% of the value you are bringing to the job.
- c. Why Upfront Flat Rate Pricing is Needed.
- d. Upfront flat-rate repairs best practice price guide format.
- e. **Subscription provided or purchase these documents:**

Product ID	Fix-Right Flat-Rate Price Guide You can order the Fix-Right HVAC or Plumbing or as an Electrical repair guide. Select one repair guide for only \$39.95 per month, select two repair guides for only \$69.95 per month, or select all three guides for only \$79.95 per month, a 12-month subscription. Includes upload data for QuickBooks™ or for your field management software. Subscription consists of the following online training and resources: <ul style="list-style-type: none">• Technician Fix-Right Flat Rate USER Instructions.• Professional service call handling process.	\$39.95/Month To \$79.95/Month
1001		

	<ul style="list-style-type: none">• Technician Service Call Handling Soft Skills for Proper Customer Communications.	
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Product ID 1002	<p>Three Upfront Flat-Rate Price Guide Set – Repair, Replacement & Ductless Mini-Split</p> <p>You can order the Fix-Right HVAC or Plumbing or as an Electrical repair guide. Select one repair guide for only \$39.95 per month, select two repair guides for only \$69.95 per month, or select all three guides for only \$79.95 per month, a 12-month subscription.</p> <p>Includes upload data for QuickBooks™ or for your field management software. Subscription consists of the following online training and resources:</p> <ul style="list-style-type: none"> • Technician Fix-Right Flat Rate USER Instructions. • Professional service call handling process. • Technician Service Call Handling Soft Skills for Proper Customer Communications. 	<p>\$39.95/Month To \$79.95/Month</p>
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#3 How to Win More Business by Differentiating Your Services

1. 1-hour:

- a. Review product or service brand name and positioning.
- b. Review examples of repair services positioning.
- c. Why it is important to create your product or service brands.
- d. We present an example service agreement brand positioning statement to be used in promotional materials.
- e. **Subscription provided or purchase these documents:**
 - i. N/A

#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 Service Agreements Trust Selling Part #2:

- a. Understanding the Service Agreement Business.
- b. Review of the many customer benefits of a service agreement.
- c. Review the many company operating and business value benefits of service agreements.
- d. Review customer service agreement expectations.
- e. Review proactive service agreement trust-selling standards.
- a. **Subscription provided or purchase these documents:**

Product ID 1008	<p>Proactive Service Agreement Sales Call Handling Tasking Procedures</p> <p>Service managers, selling technicians and technicians use this standard procedure document to perform the step-by-step procedures of a professional service agreement call handling from a lead to sold agreement. This document is provided in original</p>	<p>\$99.95</p>
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	Microsoft Word, Excel, and Acrobat PDF format to be printed on your local printer.	
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2. 1-hour - #4 How to Harvest More Business with Proactive Selling Strategies & Tactics Replacement Trust Selling Part #3:

- f. Review the system replacement business.
- g. Review of proactive trust-selling system replacement standards.
- h. **Subscription provided or purchase these documents:**

Product ID 1009	<i>Proactive Replacement Trust-Selling Standards Procedures</i> 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.	\$99.95
Product ID 1010	<i>Replacement Sales Presentation (This is included in our Home Comfort Flat Rate Price Guide</i> 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.	\$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>Complete Set Performance-Based Job Descriptions</p> <p>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>Performance Incentive plan - Office, Technicians & Installer</p> <p>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>Performance Incentive plan - Comfort Advisor</p> <p>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>
<p>1029</p>	<p>Employment Application</p> <p>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.</p>	<p>\$69.95</p>

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:**

<p>Product ID</p> <p>1026</p>	<p><i>Customer Care Call Handling Inbound and Outbound Script</i></p> <p>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.</p>	<p>\$69.95</p>
<p>1027</p>	<p><i>Customer Care Response for "Price is Too High" Objection</i></p> <p>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.</p>	<p>\$69.95</p>

#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
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#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	\$159.95
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	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.	
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#12 How to Recruit and Retain Top Performers

1. 1-hour - #12 How to Recruit and Retain Top Performers Part #1:

- a. Proven Strategies to Help You Recruit the Best.
- b. Proven Strategies to Help You Retain the Best.
- c. Why Contractors are Making Bad Hiring Decisions.
- d. The Many Costs of Making a Bad Hire.
- e. Here are 9-Tips for Hiring the Right Candidate.
- f. Checklist for Hiring Employees.
- g. Checklist for Screening an Applicant Resume.
- h. **Subscription provided or purchase these documents:**
 - i. **N/A**

2. 1-hour - #12 How to Recruit and Retain Top Performers by Coaching & Counseling Staff Part #2:

- a. Assessing the New Hire Training Needs.
- b. The Coaching Process to Develop the Team and Individuals.
- c. The Counseling Process to Change Troublesome Work Behaviors.
- d. Counseling Process of a Problem Employee.
- e. **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
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

#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**