

# Residential Office 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](mailto:News@WendellBedell.com) or call 800-240-2823.

## 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:**

<b>1015</b>	<b><i>Service Repair Work Delivery Standard Procedures</i></b> 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.	<b>\$159.95</b>
<b>1018</b>	<b><i>Equipment Start-up &amp; Maintenance Tasking Procedures</i></b> 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.	<b>\$159.95</b>

**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:**

<b>Product ID</b> <b>1016</b>	<b><i>Service Agreement Work Delivery Standard Procedures</i></b> 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.	<b>\$159.95</b>
----------------------------------	---	-----------------

**3. 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:**

<b>Product ID</b> <b>1019</b>	<b><i>Accounts Receivable and Payable Standard Procedures</i></b> 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.	<b>\$99.95</b>
----------------------------------	---	----------------

**#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>Complete Set Performance-Based Job Descriptions</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>Performance Incentive plan - Office, Technicians &amp; Installer</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>
<p><b>1025</b></p>	<p><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.</p>	<p><b>\$69.95</b></p>
<p><b>1029</b></p>	<p><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.</p>	<p><b>\$69.95</b></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:**

<b>Product ID</b>  1026	<b>Customer Care Call Handling Inbound and Outbound Script</b> This script includes a professional standardized way to greet and respond 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.	<b>\$69.95</b>
<b>1027</b>	<b>Customer Care Response for "Price is Too High" Objection</b> 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.	<b>\$69.95</b>

## #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:**

<b>Product ID</b>  1028	<b>Residential HVAC Service Contractor Organizational Charts</b> 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.	<b>\$69.95</b>
-------------------------------	---	----------------

## #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:**

<b>Product ID</b>  <b>1031</b>	<b>BudgetPro Annual &amp; Monthly Budgeting Calculator</b> 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.	<b>\$159.95</b>
--------------------------------------	---	-----------------

## #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:**

<b>Product ID</b> 1030	<b>Employee Counseling Form</b> 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.	<b>\$69.95</b>
1029	<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>

3. **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:**

<b>Product ID</b> 1030	<b>Employee Counseling Form</b> 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.	<b>\$69.95</b>
---------------------------	--	----------------

**#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**