

Receptionist 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

#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	\$159.95

	documents are provided in original Microsoft Word format to be printed on your local printer.	
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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 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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4. 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	\$99.95
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	on your local printer.	
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