Selling Technician 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

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 1001	 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: Technician Fix-Right Flat Rate USER Instructions. 	\$39.95/Month To \$79.95/Month
	 Professional service call handling process. 	
	• Technician Service Call Handling Soft Skills for Proper Customer Communications.	

Product ID 1002	 Three Upfront Flat-Rate Price Guide Set – Repair, Replacement & Ductless Mini-Split 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: Technician Fix-Right Flat Rate USER Instructions. Professional service call handling process. Technician Service Call Handling Soft Skills for Proper Customer Communications. 	\$39.95/Month To \$79.95/Month
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#2 How to Stop Missing Your Fair Share of Service Opportunities

- 1. 1-hour #2 How to Drive Consistent Growth with Proven Lead Generation Strategies & Tactics Part #2:
 - a. Review onsite opportunity assessment forms by transaction type.
 - b. Why and how to ask a logical set of repair call questions.
 - c. How to harvest post-call needs attention items found on the repair check-out opportunity assessment survey form.
 - d. Review of the 37-common opportunity items you can capture that still "need attention".
 - e. Subscription provided or purchase these documents:

Product	Technician Repair Call Check-in Opportunity Assessment Form	
ID	In most cases, when the technician first arrives on a repair call, the	
	system is dead. The system cannot speak for itself, so you must interview	
	the customer about the patient. An Opportunity Assessment Survey form	
	is needed to enable the technician to learn about the customer, the	
	problem or issue, and other areas that may present opportunities to	4
1004	improve. Customers commonly desire improved comfort, health, safety,	\$99.95
	property, and financial situation. After confirming the purpose of the call	
	and making introductions, the technician uses the script located at the top of the form	
Duaduat	Technician Repair or Maintenance Call Check-Out Opportunity	
Product	Assessment Forms – Multi-Form access to print vendor	
ID	Entitled System Condition Report . This form lets the customer go	
	forward with recommendations to save money or help avoid catastrophic	
	failures. This form allows the company to continue communicating post-	
	call with the customer to "harvest more opportunities" that need	Order from
	attention. The technician and the customer must sign off as presented	Print Vendor
1005	and received. At the end of the call, the technician reviews anything they	Under HVACPro
	have checked off that still "needs attention" on our System Condition	Option #3 that
	Report to help the customer post-call become more comfortable, safer,	Includes all
	and healthier and save money. The technician returns the System	Documents
	Condition Report to the service manager for pricing work and following	
	up with the customer on the recommended work that needs attention.	

When used with Microsoft Office and the obtained customer's email	
address or cell phone number, this form enables the contractor to	
continue post-call harvest opportunities that remain to need attention.	
Access to print vendor included in Complete Appendix B Documentation	
Set.	

- 2. 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:
 - i. General Manager Job Training Tracks
 - ii. Operations Manager Job Training Tracks
 - iii. Service Manager Job Training Tracks
 - iv. Sales Manager Job Training Tracks
 - v. Comfort Advisors
 - vi. Selling Technicians

4 How to Stop Selling and Start Consulting & Telling

- 1. 1-hour #4 How to Harvest More Business with Proactive Selling Strategies & Tactics Repair Trust Selling Approach Part #1:
 - a. Review the 4-Steps of the consultative trust selling approach.
 - b. Review why you need to standardize the service call handling process.
 - c. Review why business growth & sustainability depends on selling service agreements.
 - d. Review proactive repair trust-selling standards.
 - a. Subscription provided or purchase these documents:

Product	Proactive Repair Call Handling Tasking Procedures	
ID	Service managers and repair technicians use this standard procedure document to perform the step-by-step functions of a professional service	\$99.95
1007	call handling procedure and forms from a lead to sold repair customer	,
	checkout. This document is provided in original Microsoft Word format to	
	be printed on your local printer.	

2. 1-hour - #4 How to Harvest More Business with Proactive Selling Strategies & Tactics Service Agreements Trust Selling Part #2:

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

	Proactive Service Agreement Sales Call Handling Tasking Procedures	
Produc	Service managers, selling technicians and technicians use this standard	
ID	procedure document to perform the step-by-step procedures of a	
	professional service agreement call handling from a lead to sold	<i>\$99.95</i>
1008	agreement. This document is provided in original Microsoft Word, Excel,	
	and Acrobat PDF format to be printed on your local printer.	

3. 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:

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	ent Sales Presentation (This is included in our Home Comfort Price Guide	
ID IN INTERNET	btional tool is used by selling technicians and comfort advisors	
1010 common s What regu possible pu performar during, an provide ar	est for bid/estimate/quote to systematically overcome 4- ales objections, (1) What makes your company different?, (2) latory compliant approach you will use to obtain the lowest rice, (3) Why your Company has to set the standard of ce in the area, (4) What the customer can expect before, d post-installation, and (5) Investment Option Price Sheet to upfront itemize and logical installation sequence and price to ner. This promotional contract is provided in original Microsoft	\$99.95

Product ID 1011	HVAC System Replacement Proposal Agreement Selling technicians and comfort advisors use this promotional and system replacement transaction contract. This document is multi-form; this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	Order from Print Vendor Under HVACPro Option #3 that Includes all Documents
1012	Ductless Mini-Split-System Replacement Proposal Agreement Selling technicians and comfort advisors use this promotional and system replacement transaction contract. This document is multi-form; this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	Order from Print Vendor Under HVACPro Option #3 that Includes all Documents
Product ID 1013	Boiler System Replacement Proposal Agreement Selling technicians and comfort advisors use this promotional and system replacement transaction contract. This document is multi-form; this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	Order from Print Vendor Under HVACPro Option #3 that Includes all Documents
1014	Pro-Tech Service Agreement Access to print vendor included in Complete Appendix B Documentation Set. Technicians use this promotional and maintenance transaction contract. This document is multi-form, and this form's desired quantities are purchased directly through our authorized print vendor. Access to print vendor included in Complete Appendix B Documentation Set.	Order from Print Vendor Under HVACPro Option #3 that Includes all Documents
1032	Which Contractor Best Meets Your Needs Questionnaire in Microsoft Excel Typically, when a customer does not sign, obtain the Which Contractor Best Meets Your Needs? Introduce this 20-questionnaire to the customer as a courtesy to our clients. This questionnaire helps the customer not get damaged by using an unworthy contractor. Nine out of ten times, the customer will not even get past the first five questions. For example, question 4 asks, "Do you perform drug testing to screen employees for hire?". Simply explain to the customer the following. Suppose a contractor comes on your property with an employee under the influence of drugs and gets hurt. In that case, they can sue you personally for allowing them to work on your property stoned. Ouch. Why is this an important question to ask? As proof, when contractors recruit technicians and installers applicants for hire and tell applicants that drug testing is required, only 6 out of 10 applicants return.	\$99.95

#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 documents are provided in original Microsoft Word format to be printed on your local printer.	\$159.95

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	Service Agreement Work Delivery Standard Procedures 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
	format to be printed on your local printer.	

3. 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:

Product	System Replacement Work Delivery Standard Procedures	
ID	Includes step-by-step work delivery tasking standards from a lead to	
1017	Project/Design-Build agreement job closeout. Service managers and	\$159.95
1017	operations managers use them. This document is provided in original	
	Microsoft Word format to be printed on your local printer.	

#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:

Product ID 1022	 Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set 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. 	\$99.95	
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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:

Product	Complete Set Performance-Based Job Descriptions	
ID	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:	
	Dispatcher Job Description	
	Comfort Advisor Job Description	\$99.95
1023	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	
Product	Performance Incentive plan - Office, Technicians & Installer	
ID	Service managers and operations managers use this document. This	
1024	document is provided in original Microsoft Word format to be printed on	\$69.95
	your local printer.	
	Performance Incentive plan - Comfort Advisor	
1025	Service managers and operations managers use this document. This	\$69.95
	document is provided in original Microsoft Word format to be printed on	
	your local printer for only \$69.95. <i>Employment Application</i>	
Product	This job or employment application is an official form given to applicants	
ID	asking a wide range of questions both about the individual and their skills	
1029	related to the job. Forms are legally defensible and stand as a way for	\$69.95
	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.	