

Service Manager 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 Stop Underpricing Your Repairs to Make a Fair Profit Part #2:

- a. Step #1 - Determining your flat rate repair hourly truck and travel cost rate.
- b. Step #2 - Determining your flat rate hourly technician costs rate.
- c. Step #3 - Determining your repair warranty support cost rate.
- d. Step #4 - Determine your monthly and annual service agreement cost rate for the first unit and adder per additional unit in the same location.
- e. **Subscription provided or purchase these documents:**

Product ID 1003	<i>Technician/Installer Onsite Hourly and Truck and Travel hourly Pricing Calculator Program in Microsoft Excel</i> 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
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2. 1-hour - #2 How to Stop Missing Your Fair Share of Replacement Opportunities via Onsite Survey 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.
- g. **Subscription provided or purchase these documents:**
 - i. N/A

#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 ID 1004	Technician Repair Call Check-in Opportunity Assessment Form 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 improve. Customers commonly desire improved comfort, health, safety, 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	\$99.95
1005	Technician Repair or Maintenance Call Check-Out Opportunity Assessment Forms – Multi-Form access to print vendor 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 attention. The technician and the customer must sign off as presented and received. At the end of the call, the technician reviews anything they have checked off that still “needs attention” on our System Condition Report to help the customer post-call become more comfortable, safer, and healthier and save money. The technician returns the System 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.	Order from Print Vendor Under HVACPro Option #3 that Includes all Documents

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:**

Product ID	Onsite System Replacement Opportunity Assessment Form The On-site System Replacement Opportunity Assessment Survey Form assists the Selling Technician or Comfort Advisor to identify the transaction and scope of work and communicate that their company is the best choice to do the job. Installed-Right objectives are to help the Selling Technician or Comfort Advisor:	\$99.95
1006	<ul style="list-style-type: none"> • To identify the customer's comfort, health, safety, business, risk management, and financial transaction requirements. • To minimize the business risk associated with the transaction and make a reasonable profit above the delivery cost. • To provide the means to project a professional image. • Systematically gather customer & technical info. • To provide the means to demonstrate performance via your best practice project installation approach. • To educate and move the customer from the lowest cost option to the BEST option. <p>To provide the means to complete the sales call and close the transaction in 1 sales call.</p>	

#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.

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
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<p>Product ID</p> <p>1018</p>	<p>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.</p>	<p>\$159.95</p>
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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:**

<p>Product ID</p> <p>1016</p>	<p>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.</p>	<p>\$159.95</p>
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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:**

<p>Product ID</p> <p>1017</p>	<p>System Replacement Work Delivery Standard Procedures Includes step-by-step work delivery tasking standards from a lead to Project/Design-Build 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.</p>	<p>\$159.95</p>
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4. 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	Accounts Receivable and Payable Standard Procedures 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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5. **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	Inventory and Tool Control Standard Procedures 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
Product ID 1021	Effective Customer Care Call Handling Standard Procedures 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

#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	<p><i>Repair, Service Agreement, and Project/Design-Build Terms and Conditions Set</i></p> <ul style="list-style-type: none"> • 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 ID 1023	<p><i>Complete Set Performance-Based Job Descriptions</i></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 	\$99.95
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	<ul style="list-style-type: none"> ● Office Manager Job Description ● Accounts Payable Job Description ● Accounts Receivable Job Description ● Truck Driver/Warehouse Supervisor Job Description 	
1024	<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>	\$69.95
1025	<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>	\$69.95
1029	<p><i>Employment Application</i> 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>	\$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
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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**