

Welcome to Momentum '24



Kick-Off

Presented by Miguel Trujillo



Agenda

- Service Manager Prep
- Required Deliverables
- Project Review Process
- Mobilization & Follow Up



SM Prep

- Proper Planning Prevents Poor Performance
- Review
 - Project Estimate
 - Turnover
 - Understand Scope and Expectations
- Notify Technician
 - Plan Ahead
 - Proper Handover with Technician



Discussion

- What tools have you found helpful when planning a small project?
- Large project?



Required Deliverables

- Who, what, where, and when?
 - Right information delivered ahead of time.
 - Avoid surprises.
- Scope
- Technicians
- Material
- Subs
- Hours



Project Process Review

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- Understand and explain scope
- Evaluate the project prior to commencing
- Communicate challenges
- Set expectations
- Lessons learned
- Closed loop communication



Mobilization

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- Ready, set, go
- Motivate and empower technicians to take charge
- Minimize questions
- Visualize Success
- Check in
- Visit jobsite



Follow Up

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- Post-mortem review
- Lessons learned
- Schedule meeting with techs
- Reach out to AM and customer
- Satisfaction questionnaire
- Technician follow up essential for improvement



Discussion

- What have you implemented as SMs to support your technicians/customers in completing jobs successfully without any issues?
- What is some common feedback you have heard from technicians that succeed with getting projects done?
- What is some common feedback you have heard from technicians that have a difficult time with getting projects done within expectations?



Any
Questions?



Technician Management

Presented by Todd Power



SMART



HVACUATION

Are Leadership & Management the same?



Management

- The coordination and administration of tasks to achieve a goal.
- The act, art, skill of controlling, supervising, or making decisions.



Leadership

- The qualities of intellect, human understanding, and more character that enables a person to inspire, influence, and direct a group of people successfully.



Leadership is ALSO...

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- Awesome Responsibility
- A Skill
- Character in Action
- Hard Lines
- Authority
- Influence which is...
- Won by Playing the Long Game




Hard Lines, Soft Hands

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ex·pec·ta·tion


[,ek,spek'tāSHən] 

NOUN

expectations (plural noun)


a strong belief that something will happen or be the case in the future:

"reality had not lived up to expectations" · "there is the expectation that some individuals will do better in the program than others" · "he drilled his men in expectation of a Prussian advance"

SIMILAR: [supposition](#) [assumption](#) [belief](#) [presupposition](#) [presumption](#) 

- a belief that someone will or should achieve something:

"students had high expectations for their future"

SIMILAR: [supposition](#) [assumption](#) [belief](#) [presupposition](#) 



Influence & Authority

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Leadership is influence. It is the ability to obtain followers. When the leader lacks confidence, the followers have no commitment. A leader is great not because of his power, but because of his ability to empower others.

John C. Maxwell



Let's put some
of these ideas
into action...



A newly hired refrigeration journeyman tech, Sleazy E and experienced apprentice, devout company man, Turtle install a new bank of walk-in evaporators, the job busts on hours initially then a few weeks after, the call backs begin...

- Estimating/Sales was on point
- Job was turned over correctly
- Both techs agreed materials/hours were correct during turnover
- E said during turnover (complete with pictures) coming in under labor hours is guaranteed
- Both techs point the finger at each other in other conversations, Turtle is hesitant to do so, E is not
- Job walk afterwards reveals major quality concerns
- You have a lead tech who makes it right but no field supervisor, the customer is satisfied and will continue to use our services. Lead said the charge was low and may be leaking, welds are questionable

Group Role Play

1st in office discussion with the techs together. Proceed as needed.



Was Communication...

- Direct and clear?

Or was it...

- Passive Aggressive
- Indirect
- Confusing
- Frustrating

And...

- How did you lead?
- Any conflict?
- Any resolution?



In so many words or less...

- Be Direct & Separate Tech / Behavior
- Use as Few Words as Possible; Don't Dance Around
- Don't Be a Dictator About It; Matter of Fact
- Hard Conversations are Part of Growth



It has been several months, and Sleazy E has turned it around, in fact he has become a star player on the team, the last three weeks or so though, his paperwork has been an epic failure.

- Due to your previous interaction, you work hard to build authority with him...SUCCESS!... It seems to have paid off....
- You have talked to him in passing once, then directly a second time about this. You asked if everything is ok and if there is anything you can do for him. You also kindly reminded him of the standards and the zero-tolerance policy set in the interview.
- Your lead tech has been promoted to field supervisor, someone else you have built authority with and trust in, and he or she tells you Sleazy E spends all of his time complaining about the company standards and the other techs. He has it out for Turtle and there has been some conflict.
- Address the situation.



Beware of Cancer...

- Do Not Wait!
- Influence
- Leverage
- When All Else Fails
- Sum It Up?



Before we move
on to training...





Technician Training

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Any
Questions?



Field Proposals

Presented by James Earp



What Makes Proposals Important?

1. Shows the customer that you are being effective in completing a thorough PM/ Service call and predicting future problems before they happen and/or finding an issue that has already occurred.
2. It will prevent the system from being down at a crucial time unexpectedly or it will allow them to get the system repaired in a timely manner before the system fails.
3. This will also help the customer understand what is wrong with the system and better understand the condition of the equipment onsite and could possibly lead to unit replacement.



What's In It for Our Technicians?

1. Field proposals will keep technicians busy throughout the year.
2. The customer will see the technician's skill level and professional demeanor they bring which in turn builds confidence in not just them but in McCorvey overall.
3. Shows your direct Branch/Service managers how valuable you are by being productive and increasing your utilization and helping the branch grow while being a big contributor for its success in its respective area.



Best Practices

Before jobs, I discuss each one of these areas with the technicians to ensure they're engaged, understanding, and thinking outside the box before they arrive on site.

1. Take accurate readings of major components and know the recommended operating specs and the limitations.
2. Verify wiring that is starting to fail or has loose connections.
3. Pay attention to oil residue throughout the unit to indicate leaks.
4. Verify the age of the equipment.
5. Always give the customer multiple options on the repair in question, if there is an option to do so. (No Customer Budget is the same)
6. Verify wear on parts that are maintainable/non-maintainable that can cause damage/failure to the system.
7. Provide a quote on the spot and if the parts are available, note we can make repairs the same day with no wait time.

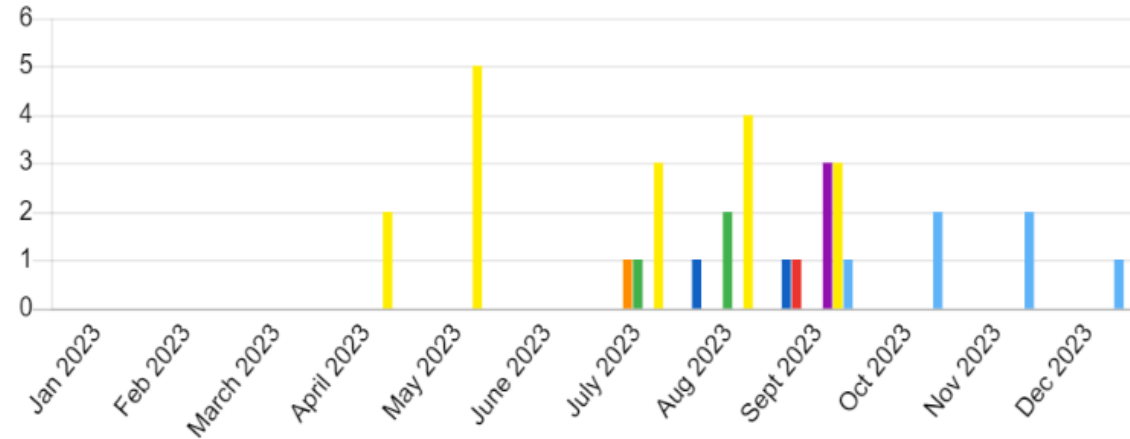


Tracking & Feedback

1. Monitor your FP tracker on a consistent basis to ensure that you can see where your technicians may need your assistance and support and give feedback.
2. When technicians are on sites stop in unannounced to check in with the customer, assist your technicians as needed, and direct/identify opportunities.
3. Ensure that customers have a clear communication line, any concerns are addressed professionally and accordingly.

FP Tracker Overview

Field Proposal Report



Communication with Account & Sales Managers

1. Verify correct hours are applied to jobs.
2. All materials are accounted for.
3. Game plan on job scope/execution of work to be completed.
4. Communicate all equipment is listed in the proposal for repairs as this will tell the customer what is being worked on and will help the tech identify the system once onsite to limit time spent on site.
5. In return this information will allow for an accurate proposal to the customer, and a solid execution for turning it over to the tech while each party understands what the task is along with what it will take to complete the task for better management and job execution.



Q&A

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How Many Of Your Field Quotes Get Accepted directly in the field?

How do you track Follow-up on Pull Through work if not approved immediately?

Do we have any additional questions or would anyone like to voice their opinion on what practices they use to help improve pull through productivity rate?

Thank you all for your time and let's make this year the best one yet for all McCorvey companies!!!



Any
Questions?



Maximizing Service Tickets

Presented by Derek Houston & Zach Loyacano



Documentation of Action (Tech Notes)



The technicians' notes should tell a story that is easily understood by anyone, especially the customer.



Billing Address					Site Address				
Customer: INCAB AMERICA					Customer: INCAB AMERICA - INCAB AMERICA				
Address: 640 107TH STREET ARLINGTON TX 76011					Address: 640 107TH ST. ARLINGTON TX 76011				
Phone: 706-346-4780					Phone: 706-346-4780				
Service Call #: DFW1020756		Contract Number:		Status: COMPLETED		Call Type: 10HVAC		Technician: MICHAEL GETSINGER	
Problems									
Description	Tech	Equip. Desc	Equip. Model	Manufacturer	Equip. Serial	Mfg Year	Work Performed		
TIME AND MATERIALS REPAIR	CEICKENHOR						Tech: CHRIS EICKENHORST, Date: 8/31/22 - I arrived and checked in I checked out the uni unit went to the roof looked at the condensers and found that the compressor plug came loose and disconnected electrical had to adjust the space tighten it back up put the plug back on the compressor farted up ran it got to get out of setpoint units up and running great job complete		
Labor									
Date	Technician			Description			Note	Hours	Rate
8/31/2022	CHRIS EICKENHORST			STANDARD HVAC				3.00	REG10



Overhead

- Overhead is anything purchased that is not related to a direct job or project.
 - Ex: Tools, Refrigerant, Piping, etc.
- Most overhead purchases should be charged to a customer.
 - If it's being used on the job, bill it.
 - All 25 lbs. of a jug of refrigerant should be charged somewhere.



Part Pricing

Type <input type="checkbox"/>	Description <input type="checkbox"/>	Price <input type="checkbox"/>
Both	Tool Charge (Misc)	\$50.00
Both	Consumables	\$25.00
HVAC	Combustion Analyzer	\$200.00
HVAC	Flow Hood	\$100.00
HVAC	Laptop/Software	\$150.00
HVAC	Electronic Leak Detector	\$150.00
HVAC	Megger	\$100.00
HVAC	Nitrogen	\$40.00
HVAC	Recovery Machine	\$100.00
HVAC	Torches	\$125.00
HVAC	Tube Brushing	\$150.00
HVAC	Vacuum Pump	\$100.00
HVAC	Small Gantry	\$100.00
HVAC	Large Gantry	\$300.00
HVAC	Chiller Barrel Heater	\$200.00
Plumb	Plumbing Camera	\$350.00
Plumb	Handheld Sewer Machine	\$150.00
Plumb	Sewer Machine	\$300.00
Plumb	Jetter Truck	\$500.00
Plumb	Pro Press Machine	\$80.00
Plumb	Pipe Threader	\$100.00



Call Promised: Monday, January 8, 2024 9:22 AM - 11:22 AM

Call Priority: Unknown

Project: BFP - COH FEE - BFP - COH FEE
 Call Type: CHILLER BARREL HEATE - CHILLER BARREL HEATER
 Consumables - CONSUMABLES - HARDWARE, ETC
 Customer PO: CONTRACT - CONTRACTED TRUCK FEE
 JETTER - HYDRO JETTER TRUCK
 LARGE GANTRY - LARGE GANTRY
 MISCELLANEOUS - Miscellaneous Items for Service Call - HVAC
 NITROGEN - NITROGEN

Status

Notes PARKING - PARKING
 PRO PRESS MACHINE - PRO PRESS MACHINE
 R-134A - R-134A

Problems R-22 - REFRIGERANT
 R-404A - R-404A

Labor R-407C - R-407C
 R-410A - REFRIGERANT
 SMALL GANTRY - SMALL GANTRY

Miscellaneous TOOL CHARGE - TOOL CHARGE
 TOOL01 - VACUUM PUMP
 TOOL02 - TORCHES
 TOOL03 - RECOVERY MACHINE

Search: TOOL01 - VACUUM PUMP

Part: TOOL01 - VACUUM PUMP

Description: Miscellaneous Items for Service Call

Cost: 0

Quantity: 1

Add Misc

Description	Qty	Unit Cost
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Equipment There is no equipment associated with the problem

Purchase Orders There are no purchase orders



OH CHARGED TO CUSTOMERS

- **RAL**
 - R410 – 8 Lbs.
 - R22 – 4 Lbs.
 - 1 Nitrogen Charge
 - 1 Contactor Charge
- **CLT**
 - R410 – 7 Lbs.
 - 1 Vacuum Pump Charge
 - 1 Recovery Machine Charge

OH CHARGED TO CUSTOMERS

- **HOU**
 - R410 – 53 Lbs.
 - R22 – 22 Lbs.
 - 1 Vacuum Pump Charge
 - 6 Nitrogen Charges
 - 1 pro Press Machine Charge
 - 4 Torch Charges
 - 4 Recovery Machine Charges
 - 2 Electronic Leak Detector Charges
 - 6 Sewer Machine Charges
 - 4 Handheld Sewer Machine Charges

OH CHARGED TO CUSTOMERS

- **DFW**
 - R410 – 104 Lbs.
 - R404 – 34 Lbs.
 - 7 Jetter Charges
 - 2 Nitrogen Charges
 - 7 Plumbing Camera Charges
 - 1 Vacuum Pump Charge
 - 17 Sewer Machine Charges
 - 5 Handheld Sewer Machine Charges
- **AUS**
 - R410 – 6 Lbs.
 - 1 – T-Stat
 - 2 Nitrogen Charges
- **SAN**
 - R410 – 3 Lbs.
 - 1 Jetter Charge
 - 1 Plumbing Camera Charge
 - 1 Coil Cleaner Charge
 - 4 Sewer Machine Charges
 - 1 Handheld Sewer Machine Charges
- **NAS**
 - R410 – 30 Lbs.



Common Jobs

Leak Check

What is Needed?

- Refrigerant added?
- Leak Detection method used?
- Nitrogen added?
- Torch used?
- Recovery Machine used?
- Vacuum Pump used?
- Any other Tool Charges needed?



Common Jobs

Drain Cleanout

What is Needed?

- Was a Sewer Machine used?
- Was the Jetter used?
- Did you have to camera the line?
- Did you have to install or repair any piping?
(Thread, Pro Press?)



Common Jobs

What other common jobs can you think of that could use a common list of tool charges or may require common thinking?



Any
Questions?



Head to Main Room for Group Photo Instructions

