MOMENTUM 24

Welcome to Momentum '24

Topics

- Account Manager Prep

- Required Deliverables

- Project Review Process

- Follow Up / Contract Setup

Account Manger Prep

- The Account Manager **<u>must</u>** initiate the turnover meeting, before the **Service Contract Entry** will be done.

Required Deliverables

Service Contract Entry Email Template

- Customer Name:

- Address:

- Contact:

- Contact Phone Number:

- Contract Amount:

- Field Proposal (Yes / No):

- Estimated Work Start Date:

- Estimated Work End Date:

- Customer PO:

- Type of Job HVAC Quoted, HVAC PM, Plumbing Quoted, Plumbing PM:

- Labor Cost:

- Material and Subs Cost:

- Hours:

- Billing Monthly, Quarterly, or End of Contract:

- Taxable (Yes / No):

- Pipedrive Number:

- Vendor Quotes Attached?:

- Vendor Quotes in H Drive?:

- Proposal Attached?:

- Proposal in H Drive?:

- Customer Approval Attached?:

- Link to H Drive File:

- Special Instructions:

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Project Review Process

- Discuss the job from beginning to end.

- Drag information out of the account manager.

- Don't assume that you have all the relevant information.

- Talk about customer expectations.

Follow Up & Contract Setup

- Order Materials

- Communicate with customer

- Pre job turnover with technicians

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Any Questions?

Agenda

- Scheduling
- Customer Preparation
- Technician Matrix
- Customer Prioritization

5 P's of Planning

- Proper Planning Prevents Poor Performance
- Scheduling
- Resources
  - Labor
  - Material
- Lead Times
- End Goal: Drive Down Cost

Scheduling

- Resource Allocation
  - Put the Correct Technician on Job
- Deadline Management
  - Meet the Schedule or Customer Deadline
- Risk Mitigation
  - Any Speed Bumps or Issues Addressed
- Communication
  - AM -> SM -> Customer -> Technician
- Cost Control
- Adaptability
- Efficiency Improvement

Scheduling

- TM & Callbacks
  - Technician or Parts Availability
- PM's
  - SM Scheduled Out Month Ahead
  - Orders Filters Ahead of Time
  - Pull Through Work
- Contract
  - SM Allocates Technicians
- Warranty
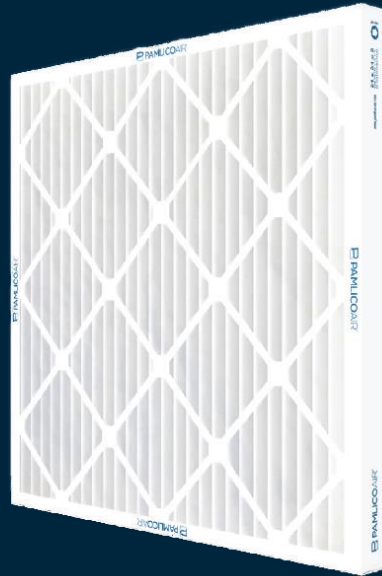 - Construction Provides Information

Time & Materials

- Hourly/Daily
  - Send a Text at 12 PM to Tech's
- Time Block
  - Scheduling Hour
- Communication with Technicians
- Approval by Customer
- Unconfirmed, Confirmed, or Hold on Teams
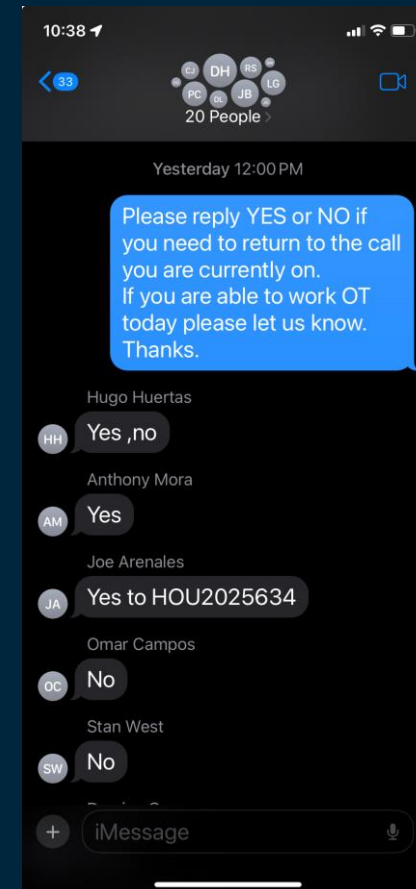
Contract Work

- Send POs After Turnover
  - CC Account Managers
  - Equipment
  - Subs
- Get Status Updates Often
  - Monthly
  - Weekly
- Schedule and Communicate
  - Account Manager
  - Customer

Warranty Work

- Support Our Construction Team
- Do Not Schedule Call Without Key Information
  - Project Number
  - Cost Code
  - POC
  - Address

Discussion

- What are some of the ways you have found to schedule easier?

- Any tools or shortcuts to make process more efficient?

- As your team grows how would you go about sharing responsibilities?

Customers Preparation

- Build Relationships
- World Class Service
- Communication
  - Schedule Ahead via Email or Phone Call
- Expectations
  - Arrival Times
  - POC
  - Check in Location
  - Parking
- Technicians

Technician Matrix

Proficiency Level	Proficiency Level Definition
Level 5 - Expert	• Applies the competency in exceptionally difficult situations • Serves as a key resource and advises others
Level 4 - Advanced	• Applies the competency in considerably difficult situations • Generally requires little or no guidance
Level 3 - Intermediate	• Applies the competency in difficult situations • Requires occasional guidance
Level 2 - Basic	• Applies the competency in somewhat difficult situations • Requires frequent guidance
Level 1 - Awareness	• Applies the competency in the simplest situations • Requires close and extensive guidance

	Packaged Unit RTU	Split System	VRF	Air Cooled Chillers (Screw)	Air Cooled Chillers (Scroll)	Water Cooled Chillers	Fan Coil Units	Air Handler	Air Conditioner	Condenser	Boilers	Water Heaters	Cooling Towers	TXVs	Compressors	Refrigeration	AAON	IVU	Trane	VFD	VAV boxes	Heat Pumps	Control Valves
Justin Gonzalez	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	
Jesse Villanueva	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	
Jacob Knapp	4	4	3	3	3	3	3	3	3	3	4	4	3	3	3	3	4	3	3	3	3	3	
Hocine Delci	3	3	2	2	2	2	3	3	3	3	2	2	3	3	3	3	2	2	2	2	2	2	
Anthony Mora	3	3	1	3	3	3	3	3	3	3	3	3	3	3	3	3	2	2	3	3	3	3	
Joe Arenales	3	3	1	1	1	1	3	3	3	3	2	2	2	2	2	3	1	1	1	2	2	2	
Damian Garza	4	4	2	4	4	4	4	4	3	3	4	4	4	3	3	4	4	4	4				
Donny Lambright	3	3	2	3	3	3	3	3	3	3	3	3	3	3	2	2	2	3	3	3	3		
Reuben Severin	3	3	1	3	3	2	3	3	3	3	3	3	3	3	3	2	2	2	3	3	3	2	
Cory Jasek	3	3	1	2	2	2	3	3	3	3	2	2	3	3	3	2	2	2	3	3	3	2	
Hugo Huertas	3	3	2	3	3	2	3	3	3	3	3	3	3	3	3	2	2	3	3	3	3		
Dillon Hewitt	3	2	1	1	1	1	3	3	3	3	1	1	1	3	2	2	1	1	1	2	2	2	
Omar Campos	2	2	1	1	1	1	2	2	2	1	1	1	2	1	2	1	1	1	2	1	2	1	
Ricardo Garcia	2	2	1	1	1	1	2	2	2	1	1	1	2	1	2	1	1	1	2	1	2	1	

Technician Matrix

- Build Relationships
- Teams
  - Journeyman/Apprentice
- Comfort Zone
- Training
  - Chiller
  - Boiler
  - BAS
  - Manufacturer

Customer Prioritization

- World Class Service
  - Urgency
- Customer Flexibility
- Seasonal
  - Tech Availability
- Volume
- Invoicing
- AMs Demand

Discussion

- What have you implemented as SMs to support your technicians/customers in completing jobs successfully without any issues?

What Are We Talking About

- Parts Tracking
- Site Preparation/Specifics (PM/Contract)
- Contract Equipment Lists
- Parts Consolidation
  - Pick Up/Delivery

Parts Tracking

- Signs Off on Equipment Submittals for Vendors
- How Do You Track Your Parts?
- Parts Check-in Rhythm
- Parts Security/Handover Once Received?

Parts Tracking

- Validating Submittals for Vendors:
  - Technician
  - Account Manager
  - Service Manager

- Key Focus Areas:
  - Identify Curb, Transition Requirements
  - Key Information
    - Tonnage
    - Power
    - Heat (Gas or Electric)
    - Supply/Return Port Layout & Size

Parts Tracking

- How Do You Track Your Parts?
  - Smartsheet
  - PO Tracker
  - Excel Document
  - Emails
  - Phone Calls

Parts Tracking

- Parts Check in Rhythm:
  - Monthly
  - Weekly/Bi-Weekly
  - Daily

Parts Tracking

- Parts Security/Handover Once Received?
  - Verify Correct/Serviceable Equipment on Delivery
  - Email, Phone Call, Smartsheet Tracker
  - QC Parts to Make Sure they are Correct
  - Schedule the Labor for Installation

Site Preparation & Specifics (PM/Contract)

- Equipment Lists
- Do we have filter/belt sizes listed for each piece of equipment onsite?
- Do we have a site map – Equipment location?
- Is their specific Customer Site Preparation/Requirements?

Site Preparation & Specifics: Site/Equipment Lists

- Did Customer Provide or Did AM/Technician Verify?
- Is the Equipment list loaded in Field Connect?
  - Provided to Operations
- Do we have a site map – Equipment location?
- Are technicians selecting the proper equipment before making their daily reports?

Site Preparation & Specifics

Do we have filter/belt sizes listed?

- Is it logged in Field Connect/Dynamics – Site Specific Notes
- What is the Best way to Source them?
- Customer Provided? Are they on site?

Site Preparation & Specifics

- Specific Site Requirements:
  - Badging Required
  - Specific Entry Point
  - Parking Requirements
  - Training
  - Protective Equipment
  - Site Availability: Night & Weekends
  - Accessibility: Fences, Sprinklers, Equipment in the Way

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Contract Equipment Lists

- Which unit are we changing out?
- How is the equipment designated?
- How do we Pass this information to the field?

Contract Equipment Lists

- Which unit are we changing out?
  - Does it have a unit # or just a model/serial?
  - Roof Map/Pictures
  - Identified/Marked out from bid walk?

Contract Equipment Lists

- How is it designated?
  - Is it a replacement or a new unit?
  - Like for like or change in tonnage?

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Contract Equipment Lists

- How do we pass this information to the field?
  - Call Notes
  - Text Message/Phone Call
  - Email

Parts Consolidation

- Pray for the best? No, plan for the worst.
- Parts hopping – potentially only on T&M… Exception not the RULE!
- Correct Equipment/Material

Parts Consolidation

- Pray for the best?
  - I think the material type is...
  - I think the material size is...
  - _____ should be enough...

Parts Consolidation

- Control Parts Hopping
  - Go to the first parts house and they don't have what you need
  - Equipment model/serial for reference
  - Stop work vs. continuing with productive work

Parts Consolidation

- Correct Equipment/Material
  - We control the delivery date/time
  - No site delays while verifying the equipment
  - Preventing unproductive time for missing pieces

Any Questions?

Agenda

- Time Blocking and Time Management
- Battle Rhythm
- Interactive moment
- Prioritization of Work
- Emergencies
- Interactive Moment
- Documentation and Tools Used

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Time Management

- Time Management is the ability to plan out your day, your week, and your month. Scheduling your responsibilities and being as productive as possible.

- Attention Management is all about examining the amount of attention you give to certain tasks or concerns.

How Can We Get Better at TM?

- Follow Your Battle Rhythm

- Prioritizing Your Day

- Understanding Emergencies

- Using Documents & Tools to Help You Stay Organized

Battle Rhythm

- What should your daily Battle Rhythm look like?
  - Tracker Review
  - Daily Huddle
  - Job Cost Review
  - Technician Follow Up
  - Technician Schedules
  - Reactive Time

Interactive Moment

- Think about your Battle Rhythm.

- Discuss with your groups what items are the most difficult to fit in each day.

- Think about what could be achieved if you had more control of your time each day.

- Discuss ways to incorporate this into your schedule.

Prioritization of Work

- Determine the order of dealing with a series of items or tasks according to their relative importance.

- Arrange into a structured order

- Continue an action or task to its conclusion

- When we don't prioritize, we react. Reacting takes time from you and gives it to others. Therefore, you forfeit the ability to control your time.

- Without organization its easy for the day to get away from you. Every task turns into a reaction instead of an intentional action.

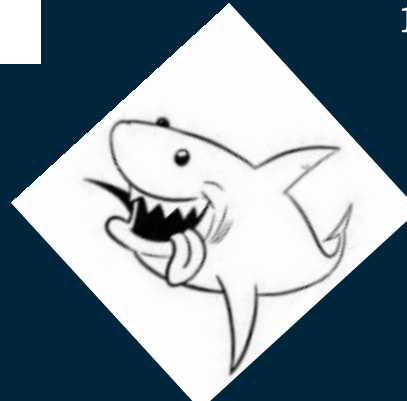- Use your tools, eliminate distractions, realize sometimes you must let go of the anchor.
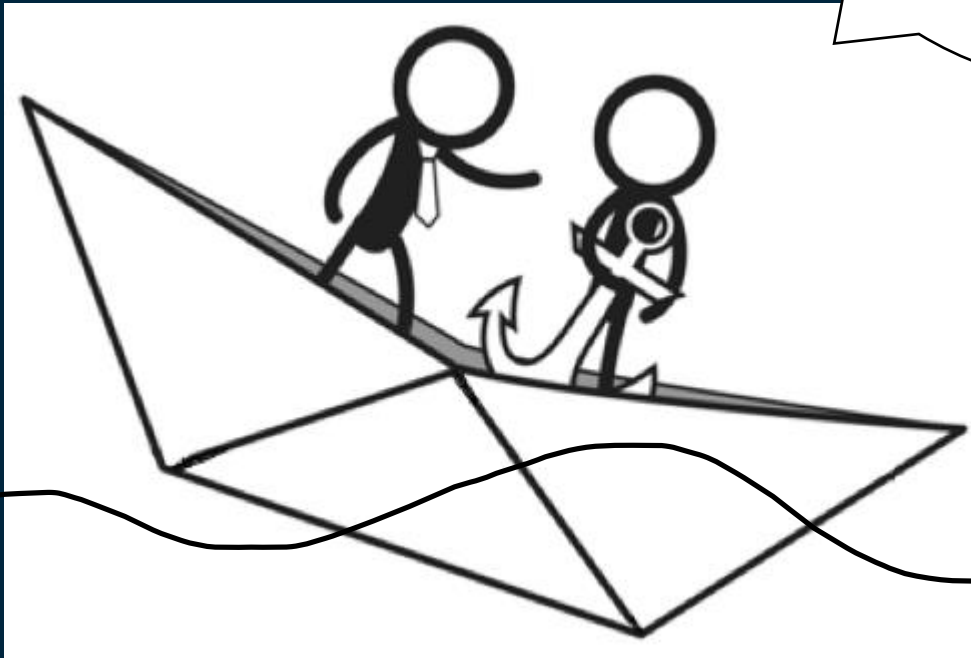
Interactive Moment

- Make a list of items that often come up during your day outside of what is listed in your battle Rhythm.

- Example: Time wasters, emergencies, etc.

- Discuss with your group how you can better prepare for these.

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Emergencies

- What constitutes an emergency?

- How do we deal with those when they come in?

- Is there a way to schedule some reactive or down time into your schedule each day to deal with these as they come up?

Documentation, Tools, and Resources

- Time Blocking
- Email Calendar
- To Do Lists
- Each Other
- Eat the Frog-Doing Your Most Important Task First
- Eisenhower Matrix
- Communication

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Any Questions?