



Commercial Service Department Business Systems TRANSFORMATION PLAN

Professionalize Your Commercial Service Operations TODAY!

Within 4 weeks of client start date Business Fitness Coach helps establish the following business systems:

- Service Agreement Lead Generation Procedure
- Professional Service Agreement Sales Call Handling Procedure
- AccuPro Commercial/Industrial Service Agreement Pricing Program
- Professional Service Call Handling Procedure
- Professional Service Proposal Agreement and Selling Process
- Truck Stock and Service Agreement Inventory Control

Client Business Benefit Objectives: (as reported by our enrolled clients)

- Obtain and implement targeted commercial list along with an effective business-to-business and outbound calling lead generation program.
- Close 6 out of 10 service agreement sales calls to a sold service agreement using the "One-Call Close" selling system.
- To obtain and implement proper commercial service agreement sales presentation, opportunity assessment form, AccuPro estimating, pricing and best-in-class commercial service agreement proposal documents for all HVAC systems categories.
- To obtain and implement proper commercial service agreement mobilization, maintenance delivery tasking and post call client performance reporting.
- Average 3.25 hours per commercial repair call by adhering to best-practice equipment repairs in compliance with published equipment manufacturers guidelines, industry and safety standards.
- Implement our written best-practice service-truck stock restocking and service agreement inventory control program.
- Deliver consistent quality on all commercial demand service work per our written demand service standard operating procedures.
- Deliver consistent quality on all commercial service agreement work per our written commercial service agreement standard operating procedures.



Commercial Service Department Business Systems TRANSFORMATION PLAN

During week #1:

1. We schedule your first Growth Strategy Session with your assigned Business Fitness Coach.
2. Upon completion of session, Business Fitness Coach registers you and your staff to access online business process and implementation training sessions.
3. Upon completion of session, Business Fitness Coach will send you the next week's Growth Strategy Session Workout meeting invite.
4. Upon completion of session, Business Fitness Coach will send you a 1-page Fix-Right Flat Rate Service Repair Setup Form for you to download, complete, fax/scan, and send back to us for configuring per your financial requirements for residential service repair pricing.
5. Upon completion of session, Business Fitness Coach will send an email advising of which online sessions to take on our Client Solution Center to obtain our complete service call handling system, customer and system diagnostic forms, example flat rate service repair invoices, residential service agreements, and staff performance based pay.
6. You, your Service Manager, Commercial Sales Rep, and Dispatcher/Receptionist staff will simply go to our Online Solution Center home page, click top right "Client Login" to access these training tracks: (3-Dark blue session for dispatchers/receptions) (8 – Dark green for commercial sales reps)
 1. CS-STEP #1.0 AccuPro commercial service agreement pricing set-up
 2. CS-STEP #1.1 Pricing Demand Service for profits
 3. CS-STEP #2.0 Marketing commercial service for profits
 4. CS-STEP #3.0 Proper customer care call handling and dispatching processes
 5. CS-STEP #3.1 Priority dispatching and dispatch board set-up
 6. CS-STEP #3.2 Professional service sales call handling process
 7. CS-STEP #3.3 Closing more service agreements at higher margins
 8. CS-STEP #3.4 Understanding Building Owner-Operator Roles & Responsibilities
 9. CS-STEP #3.5 Assessing Your Company
 10. CS-STEP #3.6 Surveying Service Agreement Equipment-System Maintenance Requirements
 11. CS-STEP #3.7 Qualifying the real, worth and win of a service agreement deal
 12. CS-STEP #4.5 Efficient demand service written service standard procedures
 13. CS-STEP #4.6 Efficient service agreement written service standard procedures
 14. CS-STEP #4.7 Efficient Quoted Repair written standard procedures
 15. CS-STEP #5.0 Stocking service truck inventory for profits
 16. CS-STEP #6.0 Daily labor and opportunity conversion performance benchmarking
 17. CS-STEP #7.0 Paying Technicians/Tune-up Specialists for Profits
 18. CS-STEP #7.1 Paying commercial Sales Reps for Profits
7. For our next meeting, client completes and prints out the following technician handouts:
 1. Order the "System Condition Report" from our preferred print vendor. See session CS-1.0.
 2. Download "AccuPro" commercial service agreement estimating and pricing program, proposal documents, "Customer and Equipment Assessment Forms", the "AccuTask" technician maintenance tasking procedures. See session CS-1.0.



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3. Order commercial B2B owner occupied call list from our preferred list Broker. See session CS-2.0.
4. Download commercial service agreement sales "Warm Call Script" and "Commercial Selling Questions that Sell". See session CS-2.0.
5. Download and edit your company's Commercial Line Card, Prospecting Strategies, and Target Marketing Letters. See session CS-2.0.
6. Dispatchers print out and edit the Professional Call Handling Script and present to Service Manager for approval. See session RS-3.0
7. Download and review the "Mobilizing the Field Service and Dispatch Function". See session CS-3.1.
8. Download and edit "Commercial Service Agreement 1st Call PowerPoint Presentation". See session CS-3.2.
9. Download and review the "Benefits of Maintenance Agreements", "Customer and Equipment Survey Forms". See session CS-3.2.
10. Download and review "Introduction to the Commercial HVAC/R Industry". See session CS-3.3.
11. Download and review "Understanding Building Owner/Operator Roles & Responsibilities". See session CS-3.4.
12. Download and review "Assessing Your Company's Capabilities and Market Position". See session CS-3.5.
13. Download and review "Equipment/Systems and Visual Condition Evaluation Techniques", as well as, "HVAC/R System Surveying and Equipment Data Gathering." See session CS-3.6.
14. Download and review "Qualifying the Real, Worth and Win of Deal Opportunities". See session CS-3.7.
15. Print out 20 copies per each Dispatcher of the "Daily Call Tracker" to be used to debrief Technicians/Installers at end of call, job or end of day if not finished. See RS-6.0
16. Print out and read for our next meeting the "Technicians Performance Based Pay Plan" – See CS-7.0
17. Print out and read for our next meeting the "Commercial Sales Reps Performance Based Pay Plan" – See CS-7.1

During week #2:

8. For this next meeting, Business Fitness Coach will demo with management and get their approval on which of our Service Department Company Standards to have implemented.
9. We confirm which processes are to be implemented.
10. Upon completion of this session, Business Fitness Coach will send you the next week's Growth Strategy Session Workout to be conducted with Dispatchers/Technicians meeting invite.

During week #3:

11. For this next meeting, Business Fitness Coach will demo with the Dispatchers/Technicians your approved Professional Service Call Handling Processes and forms, repair and service agreement pricing methods, performance based pay, as well as, post call debriefing to identify labor productivity and service sales opportunity conversion rates versus expectations.
12. For this next meeting, Business Fitness Coach will demo with the Commercial Service Agreement Sales Rep your approved Professional Sales Call Handling Processes and forms and service agreement pricing methods, performance based pay, as well as, post call debriefing to identify sales opportunity conversion rates versus expectations.



Commercial Service Department Business Systems TRANSFORMATION PLAN

13. We clarify any questions and confirm Dispatchers/Technicians understanding of your Company Service Standards to be implemented.
14. We clarify any questions and confirm Commercial Service Sales Rep understanding of your Company Service Agreement Standards to be implemented.
15. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.
 - If you have enrolled in all 6 Departments, you also have our Human Resource Management Business Systems and therefore the Business Fitness Coach schedules a meeting to implement our Performance Based Job Descriptions for your Service Manager, Dispatchers/Technicians and Commercial Sales Reps to tie them to your newly implemented Service Department Company Standards.

During week #4:

16. For this next meeting, Business Fitness Coach will discuss how best to set up your service truck stock and service agreement inventory, control processes, and forms. See session RS-5.0.
17. Business Fitness Coach will discuss the implementation of demand service written work delivery standards. See session RS-4.5.
18. Business Fitness Coach will discuss the implementation of service agreement written work delivery standards. See session RS-4.6.
19. Business Fitness Coach will discuss the implementation of quoted service job written work delivery standards. See session RS-4.7.
20. Upon completion of this session, Business Fitness Coach will send you the next Growth Strategy Session Workout meeting invite.

Performance Review Meetings:

21. We recommend that you schedule periodic Service Department reviews with your Business Fitness Coach to enable operational adjustments to help you to continue to meet your above Client Business Benefit Objectives.