

Plumbing & HVAC Service Technician's & Installer's Guide



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BLUEPRINT FOR BUSINESS SUCCESS

What is a Customer?



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A CUSTOMER

- **Is the most important person in any business**
- **Is not dependent on us- we are dependent on him**
- **Is not an interruption of our work- he is the purpose of it**
- **Does us a favor when he calls- we are not doing him a favor by serving him**
- **Is a part of our business- not an outsider**
- **Is not a cold statistic- he is flesh and blood with feelings and emotions**
- **Is not someone to argue or match wits with**
- **Is a person who brings us his wants- it is our job to fill those wants**
- **Is deserving of the most courteous and attentive treatment we can give him**
- **Is the lifeblood of this and every other business**



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Meeting expectations works some of the time.

Exceeding expectations works all of the time.



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*The bottom line of delivering
exceptional customer service is...*

*Energy &
Attitude*



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What do we do
upon arrival at
the Job Site?



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Where do I park the truck?



The preferred location is in front of the Customer's home, in the street.



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How do I approach the house?

- Go to the main door
- Ring the doorbell (or knock as gently as possible to be heard)
- Greet the customer by name and identify yourself clearly by name
- Ask which is the best way to get to the work area
- Enter through that door only



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What do we do once Inside the Home and Setting up the Job?



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What am I to do once inside the house?

- Put on shoe covers before entering
- Ask customer to show you the work area
- Review the job with the customer
- Confirm that the work order and the customer's idea of the job are the same
- Ask questions to assure you and the customer understand the scope of the job as quoted
- Confirm all equipment and piping locations
- Advise the customer on any problems you see in properly completing the work
- Decide what needs to be covered or protected



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Give the customer a **WRITTEN**
quote with your recommendations!

Have the
Customer sign to
authorize the work
PRIOR to starting
the work!!



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How do I setup the job?

- Discuss the job with your team and come together on a plan to complete the job
- Do all the prep work so the job can be done safely, quickly, and in a first class manner
- Check the Flue to be sure a liner will fit down the Chimney
- Locate water meter and shutoff
- Check electrical, gas piping, water piping
- Any code issues
- If necessary, contact the office



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Doing the job!

- No Smoking
- No foul language
- No arguing
- Safety ALWAYS
- Do the Job RIGHT
- Uniforms ON
- Team work!!



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When the job is complete!

- Go over the job with the customer
- Clean up the entire job site
- COLLECT!!!
- Have the customer sign at completion
- Do your PAPERWORK



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Questions or Comments?



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Okay, let's go and
provide some
EXCEPTIONAL
customer service!!



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