Letter of Expectations

**To: Operations Manager**

**From:**

**Subject: 20XX Role Description, Training & Incentives Plan**

20XX is a crucial year for ABC HVAC with respect to change, and the importance of your position in the company.

Installation and operational practices are in the forefront during 2025.

**Changes are necessary to make the operation function more effectively**.

Simultaneously, we have the need as a company to enact changes that are going to make us a better company.

Your position expectation, role description, incentive plan and benefit package is enclosed for review. It will be based on the performance of the department and you are considered a leader in the department.

You will be responsible for key operations practices in commercial installation, service, dispatch, scheduling and the warehouse.

It will require managerial excellence and communication of the company direction and processes. It will be a challenge. It will be frustrating at times. It requires change.

You need to understand the Key performance Indicators for your position and you need to drive the processes that support these KPI’s aggressively.

The challenge is large and will not be easy, yet it is attainable and can be especially gratifying and profitable.

Please review the compensation and the Key Performance Indicators, as well as what the company feels is the critical success factors for 2025.

President Name

January 20XX

ABC HVAC

20XX Operations Manager Incentive Program

* Base Salary of $ 00,000
* Company Vehicle or $ 350 per month in Lieu of the company vehicle.
* Individual bonus plan based on specific objectives as part of company operating plan. Set with General Manager.
* Company Bonus Plan based on Total pool of gross profit dollars generated by the company departments. X% of the overage of GP$ above the target budget (plan).
* Standard Company Benefit Program including 401K.
* The Total Company Employee Profit Sharing Program (See plan)
* Key Performance Measures for Operations Manager Review:
* GP$ per Crew day in New Home of $450 per day. Target $500
* Billings in 2025 of xx million. 2.2 Million
* GP$ of $420,000 at target. Target 500K
* Warranty Callback ratio. 1.5% or less
* Inventory shrinkage at less than 3%. Target 1%
* Warehouse review by President for cleanliness. Subjective
* Maintaining the company image policy. Subjective

ABC HVAC

Operations Manager Job Expectations Detail

**Title:** *Operations Manager* **Reports To:** *General Manager\_\_\_\_\_*

**Location:** *Field Operations* **FSLA Status:** *Exempt\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **Company Values and Philosophies**
2. Adhere to the company core values & beliefs.
3. Adhere to the company code of conduct.
4. Promote the company image and brand whenever possible.
5. Conduct your daily service tasks within the framework of the company customer satisfaction standards.
6. Work within the team first and individual second philosophy.
7. Come to work every day with appositive mental approach and attitude to work well.
8. **Leadership Expectations**
9. You are a leader, set the tone for the field departments through your approach to your role and your work with each team member.
10. Work with all company personnel too train and coach where it is appropriate so all employees understand the field operations role.
11. **Customer Service & Image Expectations**
12. Achieve 100% customer satisfaction.
13. Achieve a customer experience where a customer is completely happy and satisfied with you, our company and our services.
14. Communicate any issues and concerns regarding customer service immediately.
15. Handle all customer related issues on site – if necessary draw in others.
16. Support warranty callbacks with the same zest we support a new customer experience.
17. Image policy of company is accepted and diligently maintained.
18. **Operational Performance Measures**
19. Personally track/measure your targets and work to improve your performance.
20. Productivity billing to target rates $450 per crew day.
21. Create a budget, maintain a forecast weekly, and deliver weekly reports to President.
22. Maintaining inventory on field vehicles to company standard (Accountable for inventory) through warehouse function for new home installation.
23. Keep all field vehicles clean, neat, and inventory in specified place in truck.
24. Expense controls at target based on budget and forecast approved by President.
25. **Communications, Reporting & Compliance**
26. Communicate any issues to supervisor immediately for resolution.
27. Schedule, lead and attend all installation production meetings.
28. Schedule and facilitate field training workshops.
29. Champion of safety protocol and schedule/prepare all safety workshops.
30. Be sure paperwork is properly documented and timely based on policy.
31. Prepare a weekly forecast and review with management team each week.
32. Prepare a weekly work schedule for the field crews and builders (on-line).
33. Review policy manual and understand the company code of conduct and policies and be sure all employees are educated as well.
34. Review and agree to comply with all laws, ethics, and core values of the company.
35. **Reviews, Feedback and Personnel**
36. Prepare and provide quarterly review session for performance evaluation.
37. Coach and debrief with field personnel.
38. Accept coaching conferences with proper attitude.
39. **Skill Development by Employee**
40. Develop a technical and customer service based training regimen for all field personnel that is written and published as part of their file.
41. Develop a process for each employee in the field to have a personal skill development plan in addition to the company training.

**Employee Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Supervisor Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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Operations Manager Role Description

Primary Purpose of Position:

You will be responsible for all service and installation operations, software, scheduling, reporting and company’s field personnel. This includes hiring, training, delivering 100% customer satisfaction, image, workmanship, and providing expedient solutions for customer problems. This role description and letter of expectations describe the details.

Details of Accountability for a Technician:

1. Company Core Values, Attitude and Teamwork – These are the foundation of what make the company a successful enterprise. All work revolves around the team’s ability to function well as a unit and within the company core values.
2. The field teams need to understand the core values.
3. All employees need to embrace the company core values and philosophies as a means of conducting their everyday business.
4. You are responsible for making certain the Core Values are taught, and reinforced, and that field behaviors mirror the company image.
5. Customer Relationship Skills and Customer Experiences – These are the backbone of what we do as a company. The customer is our principal concern, and all profits flow from our ability to serve the employee well, so the employee may build relationships with the customer well.
6. The customer relationship is what a field employee’s primary job truly is. You are responsible for helping create and foster courteous, professional behavior using installation standards, and forming a lasting relationship around our company brand.
7. Customer happiness, and satisfaction are mandatory based on personal relationships with our customers and a field employee will conduct themselves with the utmost professionalism at all times.
8. Cleanliness, neatness as a person and vehicle for image will be maintained based on the company policy based on your set standards, and the company standard.
9. Execute quality installations and service calls on each and every building/home – No exceptions
10. Development of the customer evaluation processes to create accountability for the developers – Produce a report for President.
11. Development of pricing, and marketing materials to support lead creation from field opportunities to secure new service and maintenance agreements with account manager.
12. Execute any change orders and billings.
13. Execute billings and meetings with builders to release billings weekly.
14. Technical competency and Aptitude – Field personnel are most productive and valuable when they can execute customer relationship skills and technical competency as well.
15. Establish training plans for men.
16. Get men into field from your schedule – Weekly meeting on crew assignments.
17. Establish reporting for jobs.
18. Maintain labor to sales for field departments at KPI’s.
19. Maintain job schedules in the field based on company standards you establish.
20. Attend all company sponsored technical training courses.
21. Attend any suggested vendor training for technical or product upgrades.
22. Maintain trucks/tools/warehouse and equipment in peak operating condition.
23. You are accountable for all company tools in your department care.
24. Truck care, maintenance and image – our vehicles represent our company brand to the outside world and we value our company brand. Brand equals trust so we will maintain a high standard of image when it comes to our fleet.
25. Trucks are to be kept clean inside and outside at all times, washed when necessary to maintain clean visual image.
26. The truck is to be kept up to maintenance standards based on company fleet policy to change oil, have service conducted.
27. Maintain company personal image – Your uniforms, and your appearance in a manner consistent with our company policy, and the perfect service call/installation.
28. Inventory Accountability – Inventory represents a large cost of a field vehicle and even more important part of a well-operated department and truck. Proper inventory allows for improved customer service and the ability to earn more income. We expect each field employee to maintain the truck stock per the inventory replenishment system guidelines and for each employee to own accountability for 100% of the inventory on the truck.
29. Maintain the inventory replenishment system per the company policy you establish through the warehouse function.
30. Be accountable for the new home installation inventory on all vehicles to 100% accuracy.
31. Be accountable for the materials, manuals and all materials that are items listed as vehicle inventoried items.
32. Participate in inventory counts as needed quarterly and any inspection requested.
33. Administrative tasks - paperwork completion, technology, and information for the company are essential to operate well-run departments in the field. You are expected to insure completion of all necessary paperwork as requested, with a proper attitude. The administration tasks such as inventory count sheets, material requisitions, payroll tickets, and material recovery forms need to be timely, legibly and accurately completed. Your warehouse function must control all the same tasks properly.
34. Complete all required paperwork per the established daily standards.
35. Teach and train all field personnel how to use the materials supporting the company system.
36. You are accountable for the company inventory and to maintain accuracy through a policy of tracking and replenishment both in the fleet and in the warehouse.
37. Training and Skill Development- training is an important part of employee development. All areas of training are important to a field employee that is well organized, technically capable and customer oriented. It is expected a field employee reporting to you will solicit training on their own beyond the company sponsored training.
38. Computer proficiency is a must in this role – Training as required by plan.
39. Implementation of wireless service operations and software.
40. Completion of company training programs for technical competency.
41. Development of your field training plans for the men and warehouse.
42. To have a personal skill development plan as directed with the operations manager to include math skills, problem solving, customer service, technical development, electricity, refrigeration cycle, heat pump operation, gas furnaces, air conditioning with alternative refrigerants (410A), and any other training program directed by you and the management team.

**Employee Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Supervisor Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

ABC HVAC

Training Plan for Operations Manager

* **Company Core Values**
* **Leadership Training**
* John Maxwell – 21 Irrefutable Laws of Leadership
* Company Operations Manual – write it
* **Communication Skills**
* **Monthly Company Meeting and financial training**
* **Company Operational Software Usage**
* **Safety Training**
* **Vendor Products Classes**
* **EXCEL, WORD – Minimum intermediate usage**