

Training Maintenance Technicians

to Prioritize Customer Recommendations



Maintenance Technicians often get confused on what recommendations to make to customers. Should they recommend accessories such as better filtration or a ventilation system, additional service such as duct cleaning or new equipment? This article provides a method to train Maintenance Technicians on what recommendations to make.

Maintenance is a proven means of growing a company. Performing Service Agreements and Precision Tune-ups will keep your existing customer base active as well as grow your customer base. Typically for every dollar generated in service and maintenance, another three dollars will be generated in other areas such as equipment replacement. However, this can only occur if technicians make customers aware of other products and services that could benefit the customer.

Many successful residential replacement companies employ a service strategy in their business. Rather than rely on advertising for equipment sales leads, they rely on leads generated through their service and maintenance departments. This makes sense when you consider that the closure rate is typically above 80% for service agreement customers compared to about 30% for leads generated through marketing. These companies spend their marketing dollars on growing the customer base by promoting Precision Tune-ups, and then converting these into service agreements and finally into sales leads for other products and services. When a company gets good executing this service strategy, about 63% of all Precision Tune-ups will turn into service agreements and the service and maintenance departments will generate most of the sales leads for equipment replacements and accessory sales. Other articles on this website deal specifically with implementing a successful service agreement program.

Thus, most Maintenance Technicians realize it's their job to generate equipment sales leads, to generate duct-cleaning leads, to generate Indoor Air Quality accessory sales and to generate service agreement sales. The challenge is doing all of this and still maintaining 100% customer satisfaction. Maintenance Technicians sometimes get confused on when to promote an equipment sales lead versus a duct cleaning or selling an accessory. The following process provides structure for a maintenance technician to make those recommendations.

Equipment Age

One key component in deciding the order of priority for a maintenance technician is the age of the equipment. See accompanying flow chart. Each company must decide the age at which it is in the customer's best interest to simply consider the repair versus replace option and then must communicate this to their technicians. We chose 10 years for this example. Some companies chose 15 years. The following guidelines are based on equipment age.

Equipment Older Than 10 Years

This process applies to both marketed tune-ups and service agreement tune-ups. Since the equipment is older than 10 years, it's likely to be in the customer's best interest to consider their repair versus replacement options. The recommendation is to ensure we give the customer superior service as well as educating them on all our services as follows:

- The maintenance technician greets the customer and does a thorough "warm up" with the customer. This could take 5 to 15 minutes. The key here is to make it natural and show a genuine interest. Prior to the maintenance technician going to work, they must give the customer a transitional statement. The transitional statement allows the technician to get back with the customer after performing the tune-up to let the customer know what he/she found.
- The technician mentions service agreements at this point.
- If this is a marketed tune-up, the technician compliments customer in understanding the value of having equipment maintained regularly.
- If it is a service agreement customer, the technician compliments the homeowner in understanding the value of having a maintenance agreement by getting equipment maintained regularly.
- The maintenance technician performs the physical tune-up. This generally takes 45-60 minutes. The company has trained the technician to do the best tune-up he/she can possibly do. This includes cleaning equipment and checking the condition of components.
- Some companies will also perform a series of Indoor Air Quality checks as part of the tune-up. This checklist includes doing a visual check for dirt and air distribution problems, conducting an equipment static pressure check, doing a home pressure check, making a relative humidity check in the home and doing a hygrometer check. When the technician goes over the condition of the existing equipment, he/she also reviews the IAQ test findings with the customer. This information helps the customer evaluate the condition of their indoor air and can generate interest in IAQ products and services. Refer to the article on the IAQ Marketing Plan for more information on this strategy.
- While doing the tune-up, the technician must work for the customer. The technician must sweat, bleed and get dirty for the customer, if that is what it takes to do the job. When the customer sees the technician working for them, this creates a tremendous amount of trust with the technician. Working for the customer also builds a great deal of value into the service.
- By doing a diligent job of maintaining the existing equipment, the technician is in a better position to earn the right to educate the customer and to make recommendations.
- While performing a tune-up, the technician should make a list with the top 2-3 items the customer needs taken care of. One suggestion is to make a 3-column list that has the headings "Must Do's", "Recommend to Do's" and "Ideal Situation". That way if the customer only wants to take care of a few items, they can choose those under the "Must do's" column and wait to take care of the "Recommend to Do's" or "Ideal Situation" items. Offering too many recommendations may lead to confusion, distrust and the feeling that "all these guys want to do is sell me something."
- As part of the tune-up, the maintenance technician must check the condition of existing ductwork. He/she can use a Polaroid or digital camera to take pictures of the existing ductwork so the customer can visually see the condition of their ductwork in the attic or under the house. Note – Most digital cameras have the ability to connect directly to a TV to show the results on a large screen.

- Some centers require technicians to fill out a checklist, which documents the work performed, the operating conditions of the equipment and the condition of the indoor air (when IAQ tests are performed). This is another way to build value into the tune-up.
- The maintenance technician now meets with the customer to review the maintenance work performed on the equipment. The technician also discusses any repairs that are needed or additional maintenance that may be recommended. For example, if the compressor contactor points are pitted, the technician discusses this with the customer. The technician looks to gain the customer agreement on the assessment. Based on the fact that the equipment is older than 10 years, this is a good time to mention that the unit has performed well for the customer all these years. Getting the customer involved is critical. The technician should take the customer to the equipment to show what was done and to highlight the areas he/she is referring to. Keeping this part real light is key. The technician should have fun and use his/her personality; certainly no pressure!
- At this point you must interject your companies equipment sales philosophy. There are several choices including forwarding the sales lead to the sales department for a Comfort Advisor to follow up on, sending out a Selling Technician to give a second opinion or even the Maintenance Technician selling the equipment him or herself. Each has advantages. Some companies even send their sales people immediately out to the call to help the customer evaluate their comfort options. The important thing is that no matter what method is used, your people must be professionally trained to present the equipment replacement options. Having a maintenance technician trained to sell replacement equipment is a tricky strategy to pull off, since the customer may be concerned about the conflict of interest. For this and other reasons, this practice should be discouraged unless the company has developed a successful model to work from.
- If your company uses sales people as well as selling technician, the maintenance technician has a choice to make. It's based on the read they are getting from the customer while discussing the condition of the existing equipment. The choice is whether to discuss having someone come out to visit with them on their options (tech set lead) or to have a Selling Technician out to double check the unit and give a second opinion on the work that has been done (technical tech-set lead). If the customer is giving strong buying signs, the technician wants to take the tech set lead path. The customer knows the equipment is old and needs replacement. This is the perfect opportunity to have a Comfort Advisor out for a sales appointment.
- If the maintenance technician sees no buying signs and the age is above 10 years, advise the customer to have a Selling Technician out to double check the work already performed and to look at the areas of concern the maintenance technician has over his/her head. It's critical on a technical tech-set lead that when the Selling Tech arrives, he/she knows what the maintenance technician told the customer, re-diagnose the system, check the areas of concern and give a second opinion.
- If the customer is not interested in either, the tech set or the technical tech set choices, the maintenance technician gets confirmation from the customer to do any repairs and then completes the work. He/she then decides on whether promoting IAQ or an accessory is appropriate. Refer to the following section on 'After Any Repairs Are Completed'.
- The maintenance technician concludes the call by promoting a service agreement.

- If it this is a marketed tune-up call, the technician shares the benefits of a service agreement with the customer and lays out the service agreement options on a comparison sheet. If the maintenance technician sells an agreement, he/she completes the paper work, collects payment, and turns in the agreement to the company.
- If this is an existing service agreement customer and this is their last visit, the maintenance technician renews the agreement and gets all the appropriate paperwork completed.
- If this is an existing service agreement customer who has more visits remaining, the technician congratulates the customer on making the choice to invest in on-going maintenance. This builds value in the service agreement. Some companies have the technician set the appointment for the next visit and will hand the customer a reminder card (just like at the dentist office).

Equipment Less Than 10 Years

This process applies to marketed tune-up calls and service agreement tune-ups. Since the equipment is less than 10 years, it may not be in the customer's best interest to look at replacement options. This decision is the customer's and it's the maintenance technician's job to educate and encourage the customer to make the right decision. On this type of call where the equipment is under 10 years old, there are a number of other products and services that may fill a customer need.

- The technician greets the customer and does a thorough "warm up". This could take 5 to 15 minutes. The key here is to make it natural and show a true interest. The technician must give a transitional statement to the customer prior to performing the work. A transitional statement allows the technician to come back to the customer later to show them what he/she found.
- The technician mentions service agreements at this point.
- If it is a marketed tune-up, the technician compliments customer in understanding the value of having equipment maintained regularly.
- If it is a service agreement customer, the technician compliments the homeowner in understanding the value of having a service agreement and by getting equipment maintained regularly.
- The maintenance technician performs the physical Tune-Up. This generally takes 45-60 minutes. The technician does the best tune-up he/she can possibly do. This includes cleaning equipment and checking the condition of components.
- Some companies will also perform a series of Indoor Air Quality checks as part of the tune-up. This checklist includes doing a visual check for dirt and air distribution problems, conducting an equipment static pressure check, doing a home pressure check, making a relative humidity check in the home and doing a hygrometer check. When the technician goes over the condition of the existing equipment, he/she also reviews the IAQ test findings with the customer. This information helps the customer evaluate the condition of their indoor air and can generate interest in IAQ products and services. Refer to the article on the IAQ Marketing Plan for more information on this strategy.
- While doing the tune-up the technician must work for the customer. This means the technician must sweat, bleed and get dirty for the customer, if that is what it takes to do the job. When the customer observes the

technician working for them, this creates a tremendous amount of trust between the technician and the customer. Working for the customer also builds a great deal of value into our service.

- By doing a diligent job of maintaining existing equipment, the technician is in a better position to earn the right to educate the customer and to make recommendations.
- While performing a tune-up, the technician should make a list with the top 2-3 items the customer needs taken care of. One suggestion is making a 3-column list that has the headings "Must Do's", "Recommend to Do's" and "Ideal Situation". That way if the customer only wants to take care of a few items, they can choose the ones that are under the "Must do's" column and can choose whether to take care of the "Recommend to Do's" or "Ideal Situation" items. Offering too many recommendations may lead to confusion, distrust and the feeling that "all these guys want to do is sell me something."
- As part of the tune-up, the maintenance technician must check the condition of existing ductwork. The technician should use a Polaroid or digital camera and take pictures of the existing ductwork so the customer can visually see the condition of their ductwork in the attic or under the house. Note – Most digital cameras have the ability to connect directly to a TV to show the pictures on a large screen.
- Some centers require the technician to fill out a checklist to show the work performed and to document the operating conditions of the equipment. This is another way of building value into a tune-up.
- The maintenance technician next reviews the maintenance work performed on the equipment with the customer. The technician discusses any needed repairs or additional maintenance recommendations. For example, if the compressor contractor points are pitted, the technician discusses this with the customer. The technician looks to gain customer agreement on the assessment. The technician should get the customer involved by and taking them to the equipment to show what was done and to highlight the areas he/she is referring to. Keeping this part real light is key. The technician should have fun, and use his/her personality, certainly no pressure!

After Any Repairs Are Completed

- The maintenance technician promotes IAQ work if needed. If the ductwork needs to be repaired, the technician shows the Polaroid pictures of the damage. Likewise, if the ductwork needs to be cleaned or sealed, the technician discusses these options with the customer. If customer agrees, the technician calls office for the price or sets IAQ lead.
- If the customer chooses to invest in IAQ, congratulate them and review the importance of on-going maintenance.
- If the customer chooses not to invest in IAQ, the maintenance technician promotes other needed accessories such as a humidifier or Germicidal Lamp (UV light) that would benefit customer. Give documentation to support findings. The indoor quality air tests are an excellent means of helping the customer evaluate the condition of their indoor air and of generating interest in IAQ products and services. The technician must ask for the order.
- The maintenance technician concludes the call by promoting a service agreement.

- If it this is a marketed tune-up call, the technician shares the benefits of a service agreement with the customer and lays out the service agreement options on a comparison sheet. If the technician sells an agreement, he/she completes the paperwork, collects payment, and turns in the agreement to the company.
- If this is an existing service agreement customer and this is their last service agreement visit, the technician renews the agreement and completes all the appropriate paperwork.
- If this is an existing service agreement customer who has more visits remaining, the technician congratulates the customer on making the choice to invest in on-going maintenance. This builds value in the service agreement). Some companies also have the technician set the appointment for the next visit and will hand the customer a reminder card (just like at the dentist office).

