



Residential Service Tech Daily Operations Guide

Morning Preparation:

1. **Arrival at Customer's House:**
 - Ensure you arrive at the customer's house by 8:00 AM.
2. **Vehicle Inspection:**
 - Conduct a quick inspection of your vehicle before leaving home to ensure it's fully stocked with necessary tools and parts.
 - Check fuel levels and ensure the vehicle is clean and organized.
3. **Job Assignment Review:**
 - Review the day's job assignments and routes.
 - Ensure you have all the necessary job details, materials, parts, and customer information.

On-Site Operations:

1. **Customer Communication:**
 - Call or text the customer with a 30-minute ETA before arriving at their location.
 - Greet the customer courteously and introduce yourself upon arrival.
 - Avoid parking in their driveway in case of fluids leaking from your work vehicle.
2. **Protective Measures:**
 - Wear shoe covers before entering the customer's home.
 - Use drop cloths and other protective measures to keep the work area clean.
3. **Service Execution:**
 - Perform the assigned service/maintenance/repair tasks efficiently and professionally.
 - Ensure all work meets company standards and safety regulations.
 - All work must be pre-approved by the customer. We cannot simply complete a task and then expect them to pay an unknown amount.
 - If a job is unable to be completed due to unforeseen factors, the job will default to a standard labor rate per hour rounding up to the nearest 15-minute mark.
4. **Documentation and Forms:**
 - Complete all required forms via the iPad using ServiceTitan, including maintenance checklists, warranty parts forms, and any other necessary documentation.
 - Take before and after photos of the work area and the HVAC system.
 - Equipment history will be completed for all accessible equipment we work on.
5. **Customer Interaction:**
 - Provide the customer with a detailed explanation of the work performed.
 - Answer any questions the customer may have and offer additional service recommendations if necessary.
6. **Payment Collection:**
 - Collect payment for services rendered.
 - Provide the customer with a receipt and ensure the payment is recorded properly.

End of Day Procedures:

1. **Job Completion:**
 - Verify that all tasks for the day are completed.
 - Ensure all forms and documentation are completed in ServiceTitan.
2. **Vehicle Maintenance:**
 - Restock your vehicle with any used parts and materials. Submit any needed parts or material requests to Rob or Jesse.
 - Clean out any trash or debris from the day's work.
3. **Report to Office:**
 - Ensure any needed follow-up is documented via email to both Jesse (Service Manager) and Robin (Dispatcher).
 - Discuss any issues or challenges encountered during the day with Jesse or Robin as needed.
 - Follow up on customer estimates.
4. **Prepare for Next Day:**
 - Ensure your schedule for the next day is understood.
 - Verify that all necessary tools and parts are prepared for the following day's assignments.

Additional Expectations:

1. **Professional Appearance:**
 - Wear the company uniform and maintain a professional appearance.
 - Use proper PPE (Personal Protective Equipment) as required.
2. **Continuous Improvement:**
 - Participate in ongoing training and development sessions.
 - Stay updated on new products, technologies, and best practices in the HVAC industry.
 - Use resources such as HVAC School App, FieldTechHelp.com & MyLinkDrive.com.
3. **Customer Satisfaction:**
 - Strive to exceed customer expectations in all interactions.
 - Seek customer feedback to continuously improve service quality.
4. **Safety Compliance:**
 - Follow all safety protocols and guidelines.
 - Report any safety hazards or incidents immediately.

Sincerely,

The Go Green Team~

<http://gogreenheating.com/>

