The Technician

Summary Evaluation

Customer Service

**Instructions – How To Use This Information**

This evaluation process was developed to help a manager begin to understand how to train technicians on what is required for the perfect service call.

Specifically, the essay answers are used to determine what a technician knows, or more appropriately doesn’t know about customer service, relationships skills, and customer’s interests.

It is not a device to use for hiring or not hiring, but rather a tool to use to understand how technicians think, act, and what areas may need training.

Many technicians are excellent at the technical competencies, fixing the break down, but not very well organized or training on issues such as:

* Customer Service
* Questioning Skills
* Explaining Various Options
* Understanding WHY Relationships with customers are critical.
* Offering Accessories or options.

The idea for this essay test is based on the need to train technicians on the emotional aspects of customers. Customers want personalized service and care. Most service companies ignore this in favor of technical competence.

Some technicians may be quite intimidated by this, so it is important to establish a comfortable setting, and explain the reasons for what this set of essay questions is for, and how it will be used.

Technician Summary

**Instructions:**

Answer the essay questions in as much detail as you can. There isn’t just one right answer to a question, so feel free to explain the rationale for your thinking.

1. Why do you consider yourself an excellent service technician?
2. How do you approach the service call before you enter the home?
3. What are the most important aspects of a service call?
4. What do you think the homeowner wants from the company and the service call?
5. How do you approach the home?
6. What do you do to prepare for each service call?
7. What do you feel is the most important tool you have as a service technician?
8. How do you deal with an upset or angry homeowner?
9. What do you think about service agreements and why?
10. There are four types of personalities, describe them.
11. Driver
12. Amiable
13. Expressive
14. Analytical
15. How do you deal with those personalities in different ways?
16. If you had to break the service call down into steps, what would they be and describe each?
17. How would you train yourself to be better at customer relations?
18. What would you explain to a potential customer who was interested in a service agreement?
19. How would you describe to your supervisor the very best way to get your best work each day?
20. Do you want to make more money than the standard hourly wage?
21. Do you have any specific desires for advancing in your career?
22. What do you think effective teamwork means?
23. How do you make an angry customer happy?
24. When a customer wants to be involved with your work, what should you do?
25. When it comes to paperwork, and completing the invoice, the parts and materials, pricing, and finalizing the service call, how do you feel about being asked to do this with 100% accuracy and timeliness?
26. What do you know about indoor air quality?
27. How do you feel about indoor air quality?
28. What training do you feel you need to become more successful?
29. What is your idea of professionalism?

Developmental Areas from This Material

Once the test is finalized where do you go with it?

The critical issue here is where you head with a service department or a technician based off the answers to the test in terms of training and development.

Specifically these skill areas:

**Physical Skills** – Technical training competencies, managing the call processes, understanding the tools of the trade, understanding the steps in perfect service call.

**Economic Skills** – Ability to discuss pricing, create prices, understand P&L, their role, using flat rate manuals, presenting options, presenting IAQ, Service Agreements, and talk with customers about the economics of repair versus replace.

**Emotional Skills** – Relationship skills, friendliness, attitude, abilities to connect with others to build company brand, understanding the benefits of products, service agreements, accessory options, IAQ options and the like.

These three areas affect each and every customer. Customer service is a process by which all three skills sets are required. Any training needs to come from this process in your company:

1. **Establish the standards for the three skill areas above.**
2. **Benchmark the technicians against the standards through testing and evaluation – This is hard work for you but will pay dividends.**
3. **Determine the GAP between the standard and the actual abilities.**
4. **Establish a training plan and development plan for reaching the standards.**
5. **Measure the process as it progresses.**
6. **(Accessory leads, sales, service agreements, first time call completions, etc.).**
7. **Align the pay systems to compliment the Measurements.**
8. **Feedback and reviews from the team about progress.**

We recommend you review the test with the technician in a debriefing format to understand the critical thinking skills. The fact that a technician may not have certain decision making skills, does not mean they won’t be able to function well if they are taught the company standards. This becomes the primary role of a service manager.