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**Technician Customer Relationship**

Training Manual

**Section 1 - The Role of a Service Technician**

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| **Concept to be Explored** | **Learning Notes** |
| **What is the role of a service technician?** | * The role of a technician is customer service. |
| * Every technician must understand we fix the customer first, then the technical aspects of the problem. |
| * The role of the technician is to be “THE BRAND” of a company for the customer – Brand = Trust and we need our customers trust to survive and prosper. |
| **What does a technician really do?** | * Creates image and establishes trust in a company and himself. |
| * Fixes customer mindset then the technical problems. |
| * Enhances/Damages reputation & brand. |
| **What are a technician’s most important tools in order of priority?** | * His brain. |
| * His mouth. |
| * His attitude. |
| * His demeanor. |
| * His image. |
| * His technical competence. |
| **What are a customer’s home comfort needs?** | * Quiet |
| * IAQ |
| * Comfort |
| * Air Movement |
| **What are a customer’s wants?** | * Best value lowest cost. |
| * Warranties |
| * Good Experience |
| * Trust |
| * Damage/Education |
| **What are a customer’s desires?** | * Trust |
| * Great System/Low Price |
| * Relationships |
| **Why are you a service technician?** | * Need the job. |
| * Only thing I can do. |
| * Good money. |
| **Why do you sell things to customers?** | * Company forces you into actions. |
| * Compensation is better. |
| * You like to sell. |
| * It’s common sense. |
| **What is your personal value proposition to a company?** | * Attitude |
| * Productive |
| * Fix the customers. |
| * Fix the problem. |
| * Mentor others. |
| * Can sell. |
| * Willing to change. |
| **Your necessary skill sets to be successful and why?** | * Organized |
| * Positive attitude. |
| * Learning is fun. |
| * Customer oriented. |
| * Team player. |
| * Hungry-Desire. |

**Section 2 – What Customer Service is in the 21st century?**

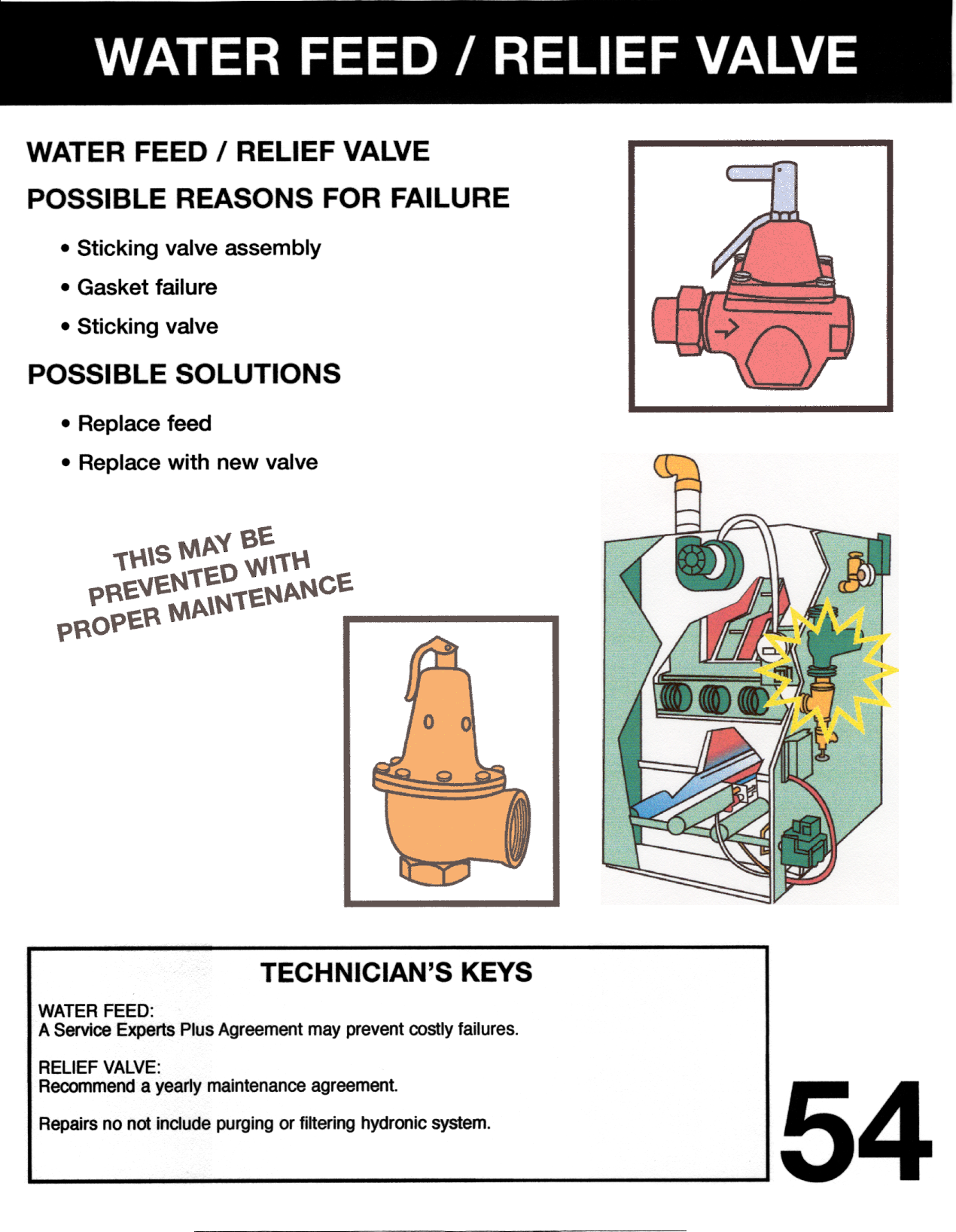
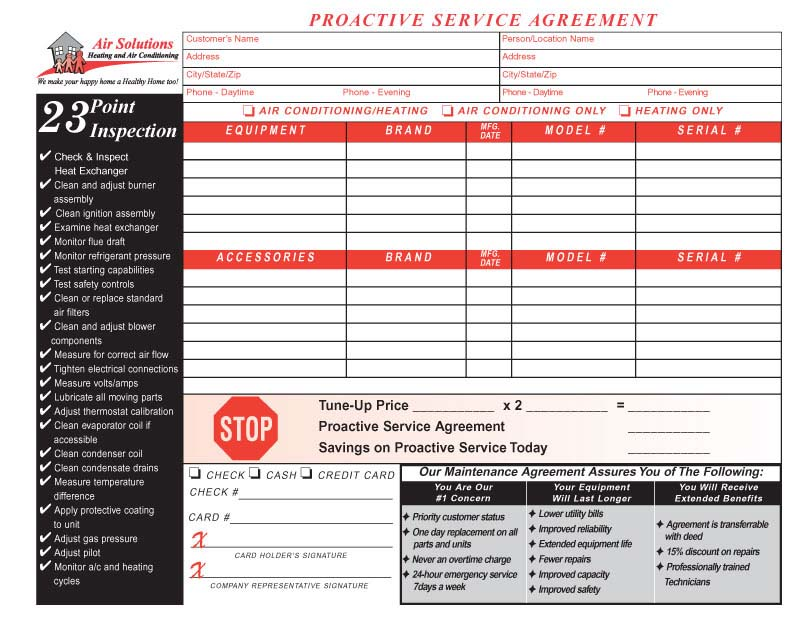
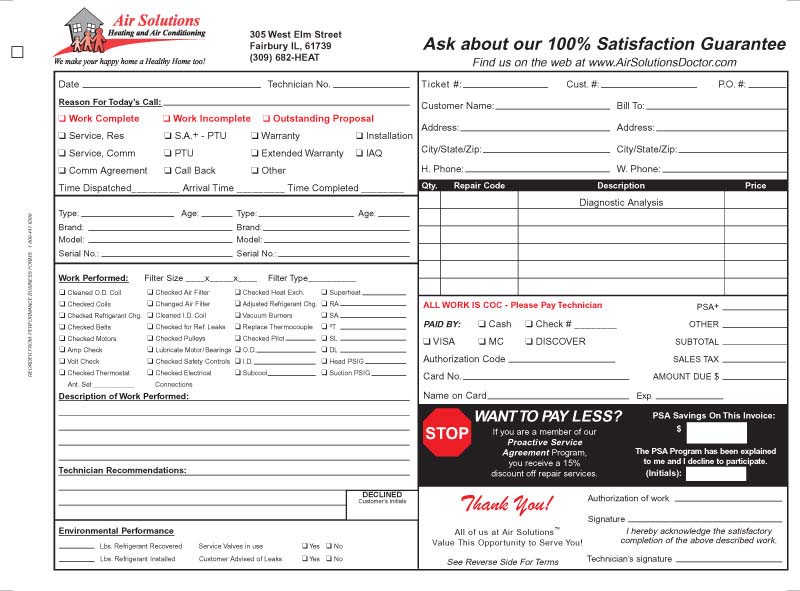
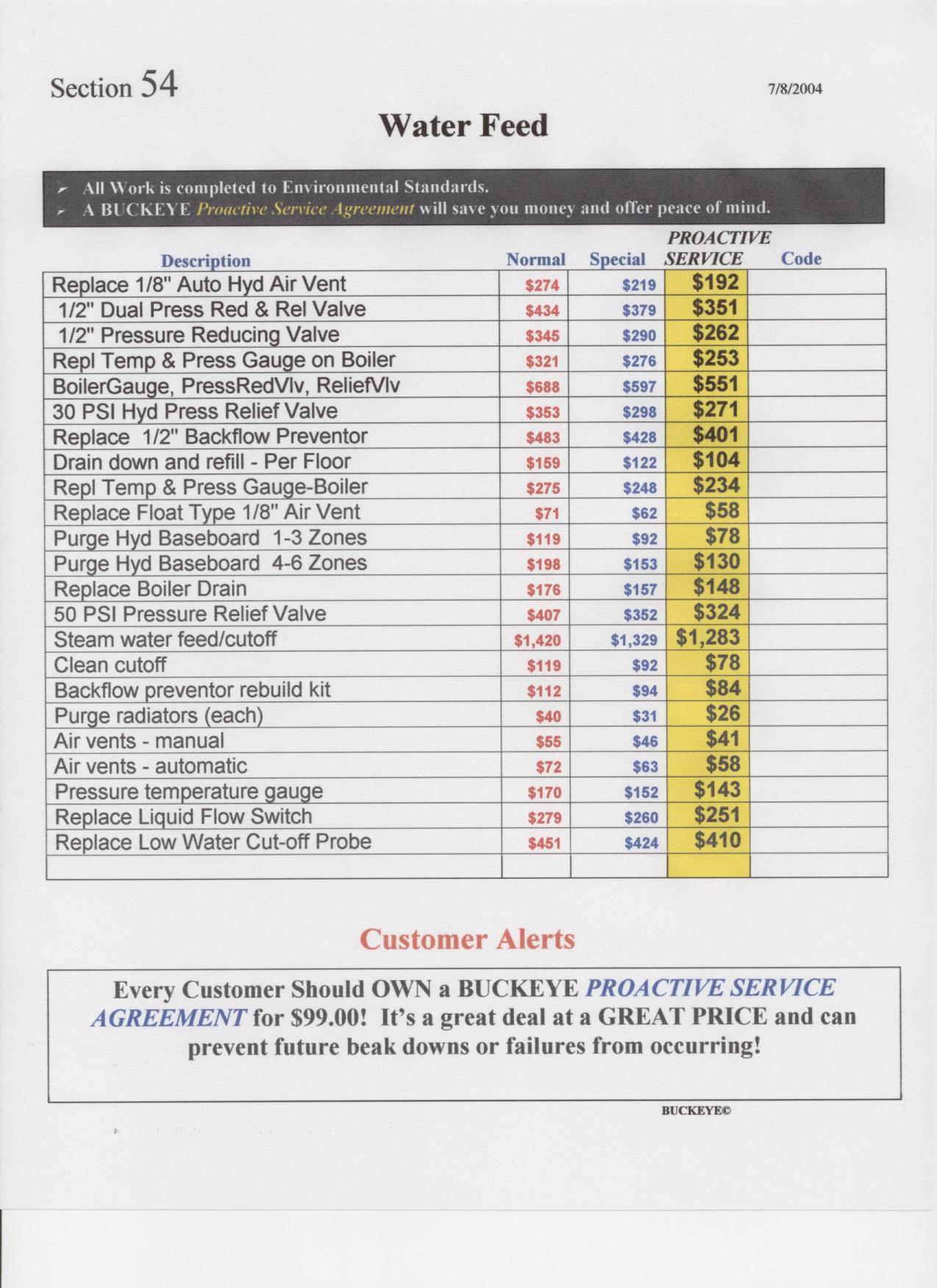
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| **Concept to be Explored** | **Learning Notes** |
| **What do customers expect?** | * Friendly |
| * Positive Attitude |
| * Great Service |
| * Fair Price |
| * Explanation of Repair |
| * What do you have? |
| * Follow Up |
| **How do you deliver what they expect and surpass their expectations?** | * Systematic Approach |
| * The Perfect Service Call |
| * Be great customer relations. |
| * Make customer feel good. |
| * Respect their time. |
| * Be an educator not a seller. |
| **How do you connect with a customer?** | * Parked? |
| * Property respect. |
| * Where you stand. |
| * Visual impact. |
| * Eye contract. |
| * Smile |
| * Attitude – BL |
| * Extend hand. |
| * Proper handshake. |
| * Smell/Feel |
| * Greeting |
| * First 30 seconds. |

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| **What if they are difficult and aggressive?** | * You are a mirror. |
| * Preparation |
| * Dispatch |
| * Control |
| * Listen |
| **(cont.) What if they are difficult and aggressive?** | * Empathize |
| * Ask questions. |
| * Confirm answers by restating – Checking. |
| * What do you want? |
| * State what you will do to resolve the problem. |
| * Confirm with them if this is acceptable. |

# Section 3 – The Fundamentals of Customer Service

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| **Concept to be Explored** | **Learning Notes** |
| **What is the perfect service call?** | * A process to EXCEED customer expectations. |
| * A sure fire way to increase your income. |
| * Happy customers. |
| * Better performance. |
| * Raises |
| * What do you have? |
| **The steps break down into 10 areas of skills and knowledge:**   * Pre-call * Arrival * The approach to the home. * Contact * The interview. * Understanding humans. * The plan for the customer. * Diagnosis and treatment options. * Executing the repairs. * Debriefing & Completion | |

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| **Why deliver this perfect call?** | * Customer Retention |
| * Referrals |
| * Accessory sales opportunities. |
| * It’s more fun than unhappy calls. |
| * Career opportunities. |
| **What products and services do**  **customers want and need?** | * Demand service now. |
| * Maintenance (PTU’s) |
| * Accessories |
| * Upgrades |
| * Cut-Ins |
| * New systems. |
| * Indoor air quality remediation. |
| **Why don’t they cooperate – Why do we have to educate (Sell)?** | * Stupid? |
| * Cheap? |
| * Disorganized |
| * Ignorant |
| * No provider. |
| * Bad experiences. |
| **How do you educate them properly so they will want to buy from your company?** | * Systematically |
| * Process of questions. |
| * Listening skills. |
| * Proper conduct. |
| * Perfect service call creates trust. |
| **Do customers buy or are they sold?** | * Most buy / some sold? |
| * Control |
| * Logical vs. Emotional |
| * Buy on impulse. |
| * Trust |
| * Likeability |
| **How do they buy?** | * They want trust. |
| * They want best value. |
| * They want low risk. |
| **(cont…) How do they buy?** | * They want peace of mind. |
| * Feel special. |
| * Economics |
| **What do they buy?** | * Service Agreements |
| * PTU’s |
| * Accessories: * Humidifiers * Air Cleaners * UV Lights |
| * IAQ Options: * Air advice * Duct cleaning * Air duct remediation |
| * Upgrades |
| * Whole new system. |
| **Why do they buy?** | * Trust |
| * Peace of mind. |
| * Crisis |



# Section 4 – Improve your life by Improving your SKILLS

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| **Concept to be Explored** | **Learning Notes** |
| **Attitude about learning – Lifetime learner!** | * Attitude controls altitude. |
| * Attitude is a choice. |
| * Great attitude = Great job not the other way around. |
| * Make yourself valuable. |
| **Get Serious about Self-Development!** | * Personal skills development plan. |
| * Invest in your skills that make you valuable. |
| **Learn the business of business and why you fit where you do, so you can achieve what you desire!** | * Business has disciplines. |
| * Where do you fit and why? |
| * Understand what it takes to make the whole Thanksgiving dinner. |
| **Set specific goals!** | * Goals = Accountability |
| * Write them down. |
| * Develop a personal life plan. |
| * Learn personal skills and the rest will come easy. |