GET PRODUCTION

TECH SCORECARDS AND ONE-ON-ONES

A short, regular conversation about real numbers changes more than an annual review ever will.

WHY MOST REVIEWS DON'T WORK

Once a year, an owner sits down with a tech and tries to remember what happened since last spring. The tech hears a few complaints and a raise amount. Nothing changes. Good technicians want to know how they're doing, and they'd like to know it this month.

CHOOSE FIVE OR SIX NUMBERS

More than that, and nobody remembers them. Include a mix of production and quality:

- **Billable hours or jobs per day**, depending on how your shop runs
- **Revenue per day or per job**, for techs who sell
- **Options presented**, the share of calls where the tech showed more than one choice
- **Membership conversion**, if plans are part of the job
- **Callback rate**, the share of jobs needing a return visit
- **Customer scores**, from a consistent survey

Add one safety or documentation measure, such as photos attached or tickets closed before leaving the job.

DEFINE EACH NUMBER

A number that everyone interprets differently is useless. Write down exactly how it's calculated, what the period is, and what's excluded. Is warranty work included? Does a

job that was sold by an advisor count for the tech who found it? Settle it once.

COMPARE FAIRLY

A tech who runs mostly maintenance won't look like one who runs mostly repairs. A new hire shouldn't be measured against a 20-year veteran. Compare people against similar work, and against their own past three months. Show the team average, and consider sharing the board with everyone once the numbers are trusted. Some people thrive on public numbers, and others feel exposed, so be thoughtful.

HOLD A 20-MINUTE ONE-ON-ONE

Once a month is enough for most techs. New hires and those who are struggling should meet more often. Use the same structure each time:

1. **How's it going?** Start with the person, and listen.
2. **What's working?** Point to a specific job or number.
3. **What's one thing to improve?** Just one.
4. **What do you need from me?** Parts, tools, dispatch changes, training.
5. **What will we each do by next time?** Write it down.

Then do what you said you'd do. If they asked for a different ladder and it isn't on the truck by next month, you've taught them not to ask.

COACH WITH A RECENT JOB

Numbers tell you where to look. Actual jobs tell you what to do. Pick a call that went well and one that didn't. Look at the notes and photos. A low average ticket might come from skipping the inspection, from not presenting options or from dispatch sending that tech only to simple calls. Without looking, you're guessing.

Then go on a ride-along. Use the ride-along scorecard, and save your coaching for the truck afterward.

SPOT PATTERNS EARLY

Watch for drops, especially in someone who's usually solid. A sudden change in production, attendance or attitude often means something's going on. It might be at home, or it might be a competitor's offer. Asking "Is everything okay?" is often the most valuable management you'll do all month.

CELEBRATE IMPROVEMENT

The most improved tech deserves as much recognition as the top producer. Highlight the person whose callbacks fell by half, or who finally got comfortable presenting options. Those stories teach the rest of the team what matters.

KEEP IT LIGHT ON PAPERWORK

Use one page, or use your software. ProCall Field and other tools can pull many of these numbers automatically. The point isn't to create a file. The point is to have the conversation, and to keep the promise you make in it.

Sources: Service ProCall program guidance.

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BEST PRACTICES: HIRING AND KEEPING GOOD TECHS

MAKE IT A HABIT

What good looks like

> You know your turnover rate and why people leave.

> Every new tech has a 90-day plan and a mentor.

> Pay, growth and recognition are clear and written down.

The habits

1. Hire for attitude and teach the trade, with a clear path from helper to lead.
2. Plan the first 90 days: ride-alongs, checklists and weekly check-ins.
3. Hold stay interviews with your best people before they think about leaving.
4. Make pay plans simple enough to explain on one page.
5. Use a fair scorecard, and coach before you correct.

6. Remove the frustrations that make techs quit, such as bad routes, missing parts and chaotic days.

Signs it's time to get help

- You lose more than one in five techs a year.
- New hires quit in the first few months.
- Techs complain about routes, callbacks or the office.

How one shop did it: Barron Heating AC Electrical & Plumbing (Ferndale, Washington). Built its own 15-week technician school with classroom, lab and field time, and takes six students per class. Nearly 40 graduates, retention above 90%, every graduate passing the NATE and EPA exams, and warranty callbacks reportedly cut in half. Contracting Business, July 15, 2026

Where we fit: We don't place techs. ProCall Field helps with what makes them stay: organized days, fair scorecards and training.

More on hiring and keeping good techs