PLAYBOOKS

TECH TRAINING THAT STICKS

Short, frequent and tied to real jobs. A training habit any shop can keep.

THIRTY MINUTES A WEEK

Long annual training fades. Hold a short session on the same morning every week and rotate through four topics:

- **Week 1: Technical.** One failure, one procedure, one tool, ideally with a real part on the table.
- **Week 2: Customer.** Role-play the arrival, the findings talk and the price.
- **Week 3: Safety.** Ladders, lockout, heat, attics, crawlspaces, driving.
- **Week 4: Numbers.** Callbacks, documentation and what the team can improve.

THE RIDE-ALONG

A ride-along is the most useful training you have. Do one a month per tech. The rule: the rider watches and takes notes, and coaches only in the truck afterward, unless safety is at stake. Use the ride-along scorecard.

THE STANDARD VISIT

1. Review the job notes and history before getting out of the truck.
2. Knock, step back, introduce yourself, put on shoe covers.
3. Ask the customer what they have noticed.
4. Inspect fully, and photograph what you find.
5. Present findings and options before starting work.
6. Do the work and test it with the customer.

7. Clean up, walk through it, and take payment.
8. Close out the job in the app before driving away.

MAKE CALLBACKS YOUR CLASSROOM

Review every callback in a blameless way: what happened, what was missed, and what to change. Then teach it to the whole team the next week.

BUILD A SKILLS MATRIX

List every task your shop does across the top and every tech down the side. Mark each: learning, can do with help, can do alone, can teach. It shows who is ready for more, and where you depend on one person.

BY TRADE

- **AC:** Technicians who handle refrigerant need EPA Section 608 certification matched to the equipment, and apprentices are exempt only when closely and continually supervised by a certified tech. Train on A2L refrigerant handling and on what your manufacturers require.
- **Plumbing:** Focus on licensing and continuing education in your state, backflow where you offer it, camera work, and gas and water heater safety.
- **Electrical:** Focus on your jurisdiction's adopted code edition, load calculations, lockout procedures, and EV and generator installs.

TEACH WHAT HAPPENS AFTER THE TRUCK LEAVES

Accurate notes and photos feed estimates, follow-ups and the next visit. A tech's note that a panel is old or a tank is rusting can become a booked job months later.

PLAN THE YEAR

Don't invent the training topic on Monday morning. Lay out a 12-month calendar that follows the work. Before cooling season, cover cooling diagnostics and safety in heat. Before freezes, cover heating or pipe protection. Before storm season, cover surge,

generators and emergency response. Schedule manufacturer training in your slow months.

TEACH THE WAY ADULTS LEARN

Keep it short and hands-on. People remember what they do far better than what they hear. Bring in the failed part, and have someone diagnose it in front of the group. Let your experienced techs teach. It improves their skills and shows that you respect what they know.

BUILD A PRACTICE SETUP

A simple training bench in the shop, even one with salvaged equipment, gives people somewhere to make mistakes safely. Add common faults and let your apprentices find them. Time them, and then repeat next month.

MEASURE WHETHER IT WORKED

Attendance doesn't tell you that anyone learned something. Connect training to outcomes. If you trained on capacitor failures, look at callbacks on that type of work. If you trained on presenting options, watch the share of calls where they're presented. Check again after 30 days.

PAY FOR GROWTH

Reimburse licenses, certifications and classes, and consider a raise when someone earns one. Some companies ask for repayment if a person leaves soon after a costly course. If you do, have an attorney write that agreement. Then celebrate the certification in front of the team.

Sources: EPA Section 608 certification requirements; Service ProCall program guidance.

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BEST PRACTICES: CLOSE RATE AND AVERAGE TICKET IN THE HOME

MAKE IT A HABIT

What good looks like

> Every visit ends with written options: good, better and best.

> Financing offered on every larger option.

> Close rate and average ticket tracked by tech, every month.

The habits

1. Use the same inspection checklist on every visit, so nothing is missed.
2. Show photos of what the tech found before talking price.
3. Present options in writing, with a monthly payment on each.
4. Ask for the decision, and accept "not today" without pressure.
5. Ride along and role-play monthly. Coach one habit at a time.
6. Hand unsold options to a follow-up process, not the tech's memory.

Signs it's time to get help

- Close rates vary widely between your techs.
- Options are given verbally, if at all.
- Financing is offered only when the customer asks.

Where we fit: ProCall Field gives techs the inspection checklist and the good-better-best options sheet, with monthly payments and a signature.

More on close rate and average ticket in the home