

## STANDARD OPERATING PROCEDURE

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**Revised by:** N/A

**Approved by:** Rick Sher

**Departments:** Day & Nite and All Service

**Page:** 1 of 5

**Title:** For Field Service Managers



10 CHARLES STREET, NEW HYDE PARK, NY 11040

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## Field Service Managers

### PURPOSE:

Field Service Managers are responsible for many administrative and sales duties, as well as all in-field operations including technician performance. By ensuring that a chain of command is followed, resulting in team and revenue growth, and maximum productivity – all while reducing labor costs.

### OBJECTIVE:

The main objective of a field service manager is customer satisfaction, organization of personnel and materials, management of branch operations, the enforcement of team structure, and to maximize revenue. Field Service Managers should lead by example while coaching all team members on proper procedures and ethics.

### RESPONSIBILITY OF:

Field Service Managers at Day & Nite Air Conditioning & Refrigeration, and All Service

## SECTION 1: QUALITY CONTROL AND FIELD SUPPORT

### MANAGING QUALITY CONTROL THROUGH TECHNICIAN TRAINING

Field Service Managers will schedule training classes related to their branch. Work knowledge deficiencies that are noted in the field will be discussed and corrected with appropriate solutions. These solutions might include one-on-one training and/or allowing a technician to shadow a senior, more experienced technician. The Field Service Manager will ensure that safety protocols are followed, such as the wearing of glasses and gloves, and following relevant building-site safety protocols.

### MANAGING QUALITY CONTROL THROUGH FIELD SUPPORT

Field Managers are responsible for routinely coaching technicians in the field. Field Service Managers will provide hands on support as needed, and provide technical information to better assist Technicians. If he is unable to be on the job physically, the Field Service Manager needs to be available at all times to deliver phone support. The primary mission for field support is to increase the first-time fix rate.

## **MANAGING QUALITY CONTROL THROUGH CREATING WORK STANDARDS AND ETHICS**

The Field Service Manager will convey the company's work policies and ethics to all technicians, leading by example, as well as by reiterating work standards during quarterly meetings.

## **MANAGING QUALITY CONTROL THROUGH COMMUNICATION**

Field service managers are responsible for thorough communication between the technicians and other pertinent company departments, as well as between themselves. The Field Service Manager will ensure that Technicians have access to proper and working communication devices, (i.e. cell phones, tablets, and the internet), as well as the necessary factory support. The Field Service Manager will ensure that Technicians are able to respond to and communicate effectively with customers. Performance reviews of the Technicians by the Field Service Manager, to the Regional Service Manager will further strengthen communication. All work and non-work related incidents that occur between work hours will be communicated to the Field Service Manager and the Regional Service Manager.

## **MANAGING TECHNICIAN QUALITY**

Field Service Managers will work with the Regional Service Manager to ensure that all new hires meet the necessary requirements to represent our company. New Hires will be thoroughly checked and tested to ensure they possess the proper technical knowledge and work ethic to join our team. Senior Technicians that have met or exceeded the standard of expectations would be utilized in the field to coach the newer members of our team. Senior Technicians would also technically train the Junior Technicians. The Field Service Manager will actively try to recruit new members for our team by promoting our company in the field to other members in the trade. The Field Service Manager will work with the Regional Service Manager to ensure that all recruitment listings are up to date and accurate. Interviews and hiring requests will be completed by the Field Service Manager as well as 90 day reviews.

## **SECTION 2: CUSTOMER RELATIONS AND SATISFACTION**

- Field Service Managers will ensure that issues that may arise between Technicians and the customer during delivery of service will be dealt with quickly, and professionally. The customer's satisfaction remains top priority
- Field Service Managers will maintain a positive dialogue between himself and the customer, as well as ensuring that Technicians do the same. This will create the tools for a positive work atmosphere at all times
- A Field Service Managers is a trusted representative of the company and will conduct himself in accordance with upper management expectations
- Field Service Managers are responsible for technical staff providing quality service -- service that the company promises and guarantees
- Field Service Managers will co-ordinate work schedules with Dispatchers, Technicians, and the customer, to ensure that the call is completed correctly and in a timely fashion
- Field Service Managers will actively seek additional team member growth while enhancing the skills of our existing Technicians. This includes coaching in work ethic and appropriate communication skills between the customer and Technician. Highly-trained and well-spoken Technicians will ensure customer satisfaction

## **SECTION 3: COMMUNICATION**

### **1. OFFICE MANAGEMENT**

The Field Service Manager serves as the liaison between the Technicians, and the Regional Service Manager. Field Service Managers and Regional Service Managers will hold monthly meetings to discuss past and future events. Field Service Managers and Regional Service Managers will also communicate to schedule quarterly meetings. To ensure stability in performance, it is imperative that the Field Service Manager be strong, concise, and supportive with their actions and knowledge of the service industry, its components, and fluidity. The Field Service Manager will communicate with the Regional Service Manager daily by either email or a phone call to cover the day's events. This constant communication between the Field Service Manager, Regional Service Manager, dispatch and the Technicians, will keep everyone aware and informed.

### **2. TECHNICIAN PERFORMANCE**

It is the responsibility of the Field Service Manager to evaluate Technicians based upon their work performance, punctuality, and general attitude towards their positions in the company.

### **3. WORKMANSHIP**

It is the responsibility of the Field Service Manager to monitor any issues that might affect Technician performance, such as basic understanding of electrical, gas, steam, or refrigeration knowledge. When the Field Service Manager highlights an issue, he will discuss the issue with the Technician, and review solutions for it.

### **4. DISCIPLINARY ACTION**

The Field Service Manager will report any lateness, insubordination, belligerence, or violations of company policy, as noted. The report will include documented write-ups and/or termination, depending on the nature of the incident. The Field Service Manager will communicate these disciplinary measures to the Technician and e-mail the signed copies to the Regional Service Manager. The FSM will routinely complete spot checks on technicians working in the field.

## **SECTION 4: MAXIMIZING REVENUE**

- The Field Service Manager will coach technicians on preventative maintenance, and how to increase their productivity during that service call
- The Field Service Manager will show technicians how to sell parts off their truck, rather than ordering duplicate parts, that may lead to time wastage and lost productivity
- The Field Service Manager will show technicians how to up-sell environment safety, by suggesting important add-ons that may improve the functionality of the customer's equipment
- The Field Service Manager will show technicians how to be responsible for ordering the correct parts that are needed to perform a first-time fix

## **SECTION 5: TECHNICIAN PROFESSIONALISM**

### **FIELD SERVICE MANAGERS WILL ENSURE THE FOLLOWING:**

- That technicians keep their truck inventories accurate.
- That technicians keep a clean and maintained vehicle
- That technicians are dressed appropriately and safely
- That technicians take appropriate and timely lunch breaks
- That technicians accurately report their overtime
- That technicians remain motivated in the field
- That communication between the Field Service Manager and the Service Manager takes place throughout the work day with a brief at the end of every day

## **SECTION 6: ADMINISTRATIVE DUTIES**

- Payroll and HR responsibilities in the branch will be provided by the Field Service manager in coordination with the Director of Human Resources. This will include weekly payroll, insurance, disability questions and implementation of vacation and sick time
- Parts receiving and distribution will be coordinated by the Field Service manager and the corporate parts department
- A truck stock inventory will be set by the Field Service Manager and sent for approval of the corporate parts department for each truck in the market
- The Field Service Manager will coordinate maintenance on the company vehicles and maintain insurance and registrations with the Director of Operations
- There will be situations where the Field Service Manager will need to write and or sell specific customer contracts, depending upon their relationships with the potential clients
- Invoice questions from customers, review of invoices, and collection of past due invoices may be required of the Field Service Manager