

STANDARD OPERATING PROCEDURE

Original Date of Issue: April, 2016

Revision Date: June, 2018

Revised by: N/A

Approved by: Eric Esposito

Department: Day & Nite/All Service

Page: 1 of 5

Title: Field Supervisors



10 CHARLES STREET, NEW HYDE PARK, NY 11040

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Field Supervisors

RESPONSIBILITY OF:

The Field Supervisor

OBJECTIVE

The main objective of the Field Supervisor is to assist the Field Service Manager and Service Manager. Assistance is done through overseeing the job-site processes, (both in and out of the field). Also, to oversee the performance of technicians, ensuring that work is performed correctly, efficiently and profitably, while maintaining the utmost customer satisfaction.

SECTION 1: MANAGEMENT OF TECHNICIANS

- Punctuality
 - Tech arrived on-time to site
 - Tech has checked-in and is ready to commence work on-site and working on the start time
- Techs appearance
 - Tech is neat and clean
 - Tech is wearing company shirt, clean pants, and proper work shoes
- Job-site etiquette
 - Tech introduced himself to customer
 - Tech reviewed basic scope of work and work locations requiring access
- Tech has booties on his feet if necessary
- Oversee Junior Technicians when working together

SECTION 2: JOB-SITE PREPARATION

- Site protection
 - Work area has been cleared and approved by customer
 - Drop cloths, Masonite or other floor protection is in place
 - Work areas are partitioned off to protect from dust etc.
- Site Access
 - A clear path has been established/approved to cart equipment and tools to and from the work area
- Site Setup
 - Tools and material(s) are set-up neatly and out of the immediate work area
 - No tools on counter tops or appliances
 - No items leaning against walls
 - Drop lights and cords are run away from the immediate work area and do not present a trip hazard
- Service Repairs
 - The area has been secured for the repair service; breaker off, lock out/ tag out, smoke alarms shut down. Approved with the building if the building needs to go off-line
- Procedures
 - Site contacts are aware of any noise, odors or other possible nuisances related to the work
 - Fire alarms have been put off-line prior to burning
 - Fire Watch and Burn Permits have been submitted

SECTION 3: MATERIAL AND EQUIPMENT

- Accuracy
 - Measurements have been taken and the location of appliances, roughs etc. have been marked-out accurately
 - Existing roughs have been measured to ensure the correct fixtures have been ordered
 - Fixtures have been checked for conflicts with existing rough
 - Customer specific measurements have been discussed and marked-out
 - Fixtures have been inspected for damage
 - Fixtures have been inspected for missing components and/or parts
 - Parts have been reviewed and identified as the correct parts
 - Customer supplied fixtures have been reviewed to ensure that the height and measurements are accurate and change orders are not needed
 - The necessary equipment and material are on-site

SECTION 4: PERFORMANCE OF WORK

- Scope of Work
 - Scope of work has been clearly reviewed with lead technician and customer
 - Any additional work required outside of original scope is accessed, discussed with customer and accurately quoted
 - Office, as well as the FSM is notified of material, equipment and time needed to perform the additional work

SECTION 5: CUSTOMER SATISFACTION

- Site Condition
 - Debris has been bagged, carted away or moved to designated area for pickup
 - Site protection has been removed
 - All equipment and left-over material has been removed from site
 - All areas have been broom swept
- Work Performed
 - All work is performed neatly and according to proper procedure
 - Work has been inspected for leaks and proper operation
 - Components have been tested and calibrated
 - Flow of water, gas, etc. has been restored
 - Hot water, heat, etc. have been restored and tested for proper operation
 - Use of fixtures and appliances have been reviewed with customer
 - All user manuals, parts list, and warranty paperwork has been given to the customer. signatures obtained where necessary
 - All make, model and serial numbers have been recorded
 - The correct piece of equipment has been created or picked from the existing equipment list
 - Customer has been given plumbing and/or pamphlets for other trades
 - A sticker has been placed on the unit
 - Tech has reviewed other services we offer
 - Tech has solicited customer for any additional work they require after the original scenario is rectified
 - Follow-up on “Return Trip” and “Call Back” scenarios to ensure the issue is properly resolved
 - Help Field Service Manager maintain quality control
- On site surveys and estimates
 - Description of work listed as per job, (See example estimate)
 - Note pipe distances and sizes
 - Make, model, serial number, and btu’s of fixtures and appliances have been recorded
 - Part numbers of components needing replacement have been recorded
 - Make sure of locations, specifications, and measurements

- Take photos of site, fixtures, and/or appliances
- Check entryways to site for accessibility and size
- Get contact information; name, phone, fax and email
- Submit description of work, labor costs and list of material and equipment needed to office
- Prepare quote and submit to customer
- Follow up with customer to ensure they received quote
- Review the scope of work and answer any questions they may have
- Assessment of Repair
 - Record parts needed for repair
 - Are parts available on the truck
 - If not on truck, forward information to the Parts Department for outsourcing
 - Description of work and part numbers have been provided so a quote can be created and parts ordered
 - Customer contacts have been gathered; email, fax, etc. for submitting quote
 - Meet with clients to better explain a repair and/or field concern
 - Help Engineer or add input for obsolete equipment upgrades
- Training
 - Assess training needs by observing the technicians in the field
 - Work with Service Manager to develop a training schedule
 - Conduct in-house training sessions

SECTION 6: FIELD SERVICE SUPERVISOR GOALS EFFECTIVE MAY 1, 2017

Mission:

As a Field Service Supervisor (FSS) for the Day & Nite/All Service (DNAS) Family of Companies, you are an ambassador of our brand. You will utilize 50% of your work day as a Field Service Supervisor (FSS), which may be adjusted based on workload at the Service Manager's discretion. You will directly report to the Field Service Manager (FSM). Your mission is to supervise and oversee the field staff to insure a consistent customer experience at the highest levels of satisfaction, while identifying opportunities to generate revenue and ensure that maintenance and repairs are completed at, or below the designated cost. As part of the management team you will be responsible for maintaining a motivated, hardworking, and successful Field Service Team.

Goal #1: Communication

The purpose of this goal is to maintain a chain of command throughout the service team, allowing information to flow freely, bi-directionally. Key performance indicators (KPIs) of success to include, but not limited to, are reduced instances of errors due to a lack of communication and improved inter-departmental communication.

1. Make telephone contact with each Technician within your responsibility each morning, unless you are scheduled to see them as a first stop visit.
2. Make telephone contact with each Technician within your responsibility at the end of the shift, to review the events of the day.

3. Send an email at the end of each day to the Field Service Manager, with a cc to the Service Manager, detailing phone calls, visits, client interactions, and any other pertinent information that may also need to be communicated to other areas of the company as needed.
4. Monthly follow-up on client concerns and issues to aid in client retention. Note: severe concerns and issues need not wait for the monthly meeting and should be communicated, as in #3, on a daily basis.

Goal #2: Quality Control

The purpose of this goal is to maintain quality control through Technician site visitation, evaluation, and training. Key performance indicators (KPIs), of success to include, but not limited to, are the rate of progress for apprentices, the completion of projects at or ahead of schedule, increased generation of T&M revenue on PM visits, and a consistent customer experience.

1. Your Technician assignments will be determined by the Field Service Manager (FSM), and the Service Manager (SM). Your visits will focus primarily on the newest and least technically advanced team members. You will be required to make a minimum of 5 direct visits per each week. Additionally, you will visit the more senior team members on a monthly basis. Additional visits may be directed at the discretion of the FSM and/or the SM.
2. Technician visits should take 15-30 minutes, during which you will review the items covered on the Supervisor Checklist. This is your opportunity to address any concerns you may have, as well as highlight Technician successes in real time. Immediately following the visit, you will complete the Supervisor Checklist found attached to your supervisory overhead ticket. Items to include, but not limited to, are:
 - a. Inspect the inside and outside of the trucks for cleanliness and damage.
 - b. Ensure the Technicians are arriving on time to their appointments.
 - c. Ensure that all applicable personal protection equipment (PPE) is being utilized properly.
 - d. Verify that if parts are needed, that they are removed from truck stock correctly.
 - e. Verify that part numbers and pictures are being submitted.
 - f. Verify that work orders are emailed to the customer with the customer's signature and printed name.
 - g. Verify that the work order status is being changed correctly.
3. When performing site visits you will find the client management on site and introduce yourself. Make note of any compliments and/or concerns they may have as well as their full name and title. Example: Sue Smith, General Manager.
4. Provide follow-up site inspection visits to ensure that work has been performed to the DNAS Family of Companies standard.
5. Items in this section should be included in your daily e-mail to the FSM and the SM for review and discussion as necessary.

Goal #3: Training, Education, and Advancement

The purpose of this goal is to provide training and technical support to Field Service Personnel and evaluate their progress. You will mentor and coach the newest and least experienced Field staff to

help them develop their technical abilities, as well as proficiency with company policies, procedures, technologies, and industry best practices. Key performance indicators (KPIs), of success to include, but not limited to, a decrease in service related client contract cancellations and/or lost time and materials (T&M) revenue.

1. Provide technical support regarding equipment troubleshooting and repairs.
2. Provide support with company technology such as Tech Anywhere.
3. Ensure that the Technician Standard Operating Procedures (SOPs) are understood and being adhered to. Provide feedback to the FSM and the SM if and when you feel an adjustment may be necessary.
4. Identify and communicate to the FSM and the SM individual obstacles to success for Field Service Personnel.
5. Identify and communicate to the FSM and the SM any group training opportunities.
6. Identify and communicate to the FSM and the SM, any opportunities for individual growth and future potential leadership in our organization.
7. Items in this section should be included in your daily email to the FSM and the SM for review and discussion, as necessary.
 - All equipment and left-over material has been removed from site
 - All areas have been broom swept